SUPERMARKET BUSINESS

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BRAND POWER

HOW TOP BRANDS COMPETE FOR SHARE OF MARKET IN 350 CATEGORIES, TODAY AND FIVE YEARS AGO

SUPERMARKET BUSINESS

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Cover Photo: David DiMicco

...AND THEN THERE'S ALBERTSON'S

By Ken Partch, Editor-in-Chief

For one reason or another everybody seems to be talking about Albertson's these days. But the funny thing is that unless you look at the financial statement, there isn't an awful lot to say. The company maintains a decidedly low profile.

Albertson's is an enigma to most people in the industry. Even those who know the industry well. The reason that it is an enigma is that beyond the mundane things, such as running a good business and getting a high share of market per store, it is hard to say what distinguishes Albertson's from the rest of the pack. It usually isn't even the price leader, although it's always close.

Although the company runs a lot of superstores and combo stores (and was an early entrant into combos with Skagg's as a partner), it also has a lot of stores that can best be described as plain vanilla in this day of what one writer calls fashion leaders. Albertson's is no fashion leader, and probably wouldn't know what one is.

Of course, that's what the writer is writing about: how supermarkets in general don't know much about fashion, and that's why the consumer finds them so dull. And this brings me to the crux of the matter.

For many years, I have puzzled over what academicians would call the dichotomy of theory and practice. It bothers me when practice does not fit theory—and vice-versa. But one of the things I have discovered about retailing after all these years is that it doesn't have to. It just has to work. A good retailer simply does it. You figure out the theory.

The writer mentioned above is Norman H. McMillan of McMillan/Doolittle, a Chicago retailing consulting firm, and the article he wrote appears in the Fall 1990 edition of *International Trends in Retailing*, published by Arthur Andersen & Co. ITR is one of my favorite publications, but I have to take issue with McMillan's premise and conclusions. I also have to admit that a short time ago, I would have agreed with him whole-heartedly.

A short time ago (three, four or five years), things were happening so fast in terms of store format and design that we could hardly keep up. At last, I thought, this business is finally becoming *marketing* oriented, not simply *distribution* oriented.

Meyer Marcus, when chairman of Food Fair, was wrong (I thought), when he told me many years ago that "we are not in the food business, we are in the food distribution business." In the '80s, this business became fun to write about. They were finally doing it my way. Uh, huh.

Looking at the plain vanilla stores run by Food Lion and Albertson's, and looking at their P&Ls, who is to say that they are wrong?

Everything pointed in the direction of moving more and more into the food and foodservice business, and we said so. To a large extent we were right. If you do it well, it works. Look at Giant Food, look at Randall's, look at Wegman's, look at Kings. And this is what McMillan is telling us. It works, says McMillan, because these stores are moving in the direction of what people want, the products they want, the fashion they want. McMillan's whole background is in department stores and general merchandise stores, and these are the examples of proof that he calls upon.

He cites the Seattle market, where there are many fashion leaders in the supermarket business. He plots the Seattle stores on a graph beginning with Larry's, then Olsen's, then QFC, and then Tops. Then the distances begin to widen and there is Safeway, Fred Meyer and last there is Albertson's. McMillan chides supermarkets for their dullness, for their lack of interest in fashion. And he says that they are making a great mistake in this because consumers don't like them for it. He does not even bother to mention Albertson's.

The problem with applying theories to a volatile business such as retailing is that you had better be sure you are looking at the right parameters. While the industry has been busy with formats such as Extra, Edward's Food Warehouse, Cub, The Real Superstore, Vons Pavilions, Tianguis, Someplace Special, Simon David, and Irvine Ranch Farmers Market, and most of us in the media have been falling over each other to write about them, there have been nagging shadows stalking my subconscious. One shadow has been Albertson's. Another is Food Lion.

While several of the above have come and gone, or evolved into something else, Food Lion and Albertson's have gone on doing what they do best—running plain vanilla supermarkets and making money—more money than most of their competitors by far. Albertson's has a financial statement that would make most accountants in any business drool with envy.

Something else has stuck in my mind for a few years. At a financial analysts' meeting, Warren McCain, then Albertson's chairman, was asked by a newspaper reporter if all these new service departments were increasing the cost of food. I am sure that the reporter did not understand McCain's answer, but I did, because it sounded so much like Meyer Marcus. "This is largely a commodities business," said McCain. It is also very much a replacement business, I might add.

I am beginning to think the unthinkable. I think that it is so much harder to make money the way Albertson's and Food Lion do it. It takes so damn much work!

Could it be that we are looking at two different ways of dealing with two different consumer worlds—the fashion conscious and the anti-fashion conscious? And that both approaches can work? ■

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TRADESCAN

Coborn's Wins Top NGA Honors

The National Grocers Association (NGA) announced the winners of its 1991 Excellence in Merchandising competition at the NGA convention in New Orleans on Jan. 29. Merchandising efforts were judged for creativity, visual impact, employee involvement and bottom-line performance.

Coborn's Inc. (St. Cloud, Minn.) won best overall award for a "Salad Eat Wave" promotion, a beach-themed effort that boosted deli sales by 20 percent. It also won NGA honors for best deli merchandising, one of 13 prize categories. Other categories and winners follow.

•Grocery: Lucky Stores, Oceanside, Calif., for its red, white and blue-themed National Brands Key Buy Savings Event, held each February.

•Meat: Goff Food Stores, Haslett, Mich., for its "country harvest" theme, decorating the meat department as a 4-H country livestock barn.

•Produce: Friedman's, Butler, Penn., for a February Chilean fruit promotion using a 24-foot display case and Dole-supplied fruit.

•Dairy: Tops Friendly Markets, Elmira, N.Y., for an "autumn cheese fest" with antique general store theme and a cheese "munchie monster."

•Bakery: Rosauers Supermarkets #26, Spokane, Wash., for a wedding cake promotion complete with gazebo, wedding cakes, wedding attire and wine.

•Seafood: Brown & Cole Market Place, Ferndale, Wash., for its "Lobster Mania 2" event, with 2,500 live Maine lobsters.

•Frozen Food: Hartville IGA Super Center, Hartville, Ohio, for its "March is Frozen Food Month" promotion.

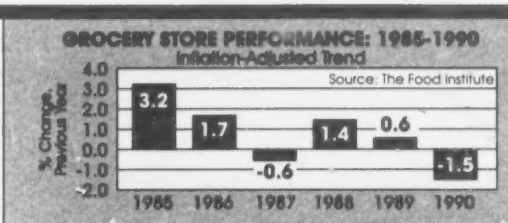
•Nonfood: Stecks IGA, Cody, Wyo., for its "Western Day Roundup," with cart and tracks coming out of a mine replica.

•Single Manufacturer: Pick 'N Save, Dekalb, Ill., for a record-breaking root beer float made with 1,000 gallons of root beer and 400 gallons of ice cream in a 12'x3' swimming pool.

•Outside the Store: Pay Less Super Market, Anderson, Ind., for a "Great Pumpkin" party at a landmark theater, to support the theater and promote a new low-calorie dessert.

•Best Theme: Dan's Country Market, Cheyenne, Wyo., for its "Big Top" brands spectacular, drawing attention to circus foods such as popcorn, peanuts, cotton candy and hot dogs.

•Specialty/Ethic Foods: Baker's Supermarket, Omaha, Neb., for a replica of the London Bridge made with 12-packs of soda and surrounded with British merchandise.



Inflation-Adjusted Food Store Sales Decline; Restaurants Flat

Supermarkets and other food stores slipped 1.5 percent in inflation-adjusted dollars in 1990, while restaurants and bars scored a marginal 0.2 percent gain, according to The Food Institute (Fair Lawn, N.J.).

The findings are based on preliminary Census Bureau estimates of $367.5 billion in food store sales, including $345.5 billion spent at grocery stores. While the food store total was up 4.9 percent, prices rose 6.4 percent, for a real decline of 1.5 percent.

The 1990 decline follows three years of listless inflation-adjusted growth—0.5 percent for 1987-1989. Inflation-adjusted growth from 1983-1986, by contrast, was 2.8 percent.

While eating and drinking places have averted an inflation-adjusted decline with 0.2 percent "real" growth for 1990, those flat results contrast sharply with 6.3 percent inflation-adjusted growth as recently as 1987.

Cub Teams with Magazine to Make Seafood Easy

As we noted in the February issue of SB, recipe cards alone won't make seafood a big seller. Cub Foods division of Super Valu Stores, Inc. (Eden Prairie, Minn.) has taken recipe promotions a step further by linking cooking instructions with a magazine column that focuses on convenience.

The program, called Made Simple by *Bon Appetit*—the magazine, that is—was launched on Feb. 13., Ash Wednesday, a day when many Christians eat no meat.

The 13 recipes in the program are garnered from "Too Busy To Cook" columns that appeared in past *Bon Appetit* issues. Cub customers receive one recipe card a week which includes a color photo of the prepared dish, directions and a tear-off subscription form for *Bon Appetit*. The stores also will sample seafood prepared according to the recipes.

"Internally, we've been calling this program the 'Great American Fish Switch' because our goal is to make customers feel so confident about preparing fish that they make it a regular part of their at-home meals," says Roger DeAngelo, Cub's corporate director of meat, seafood and deli.

Food Groups, Others, Push for FTC Guidelines on 'Green' Claims

So far, no manufacturer has boosted sales by declaring that their packaging, or product, rots. But other "green" claims, such as "recyclable" and "compostable," can provide a competitive advantage.

There's a hitch, however. California, New Hampshire, New York and Rhode Island have already adopted different "green" marketing regulations. In Rhode Island, for example, products and packaging aren't "recyclable" until a recycling infrastructure is available to 75 percent of the population.

In a bid for a nationally uniform green marketing standard (and one allowing "green" claims in regions with only a fledgling green infrastructure), the National Food Processors Association (NFPA), the Grocery Industry Committee on Solid Waste (GICSW) and other industry groups urged the Federal Trade Commission (FTC) last month to adopt guidelines.

If adopted, the FTC standard would not have any binding power over state regulations. But the mere existence of FTC guidelines could influence states to follow its definition for "recycled," "recyclable," "compostable," "reusable/refillable," and "source-reduced."

The FTC guidelines might also help take the steam out of state-level restrictions on green marketing. Last November, attorneys general from 10 states called for limits on recycling claims in areas where no current recycling opportunities exist.

Along with NFPA, FMI, NAWGA and NGA, GICSW includes members from the Grocery Manufacturers of America, the American Meat Institute, the Produce Marketing Association and the United Fresh Fruit and Vegetable Association.

Other associations backing NFPA's petition include American Association of Advertising Agencies, American Frozen Food Institute, Association of National Advertisers, Can Manufacturers Institute, Chemical Specialties Manufacturing Association, International Dairy Foods Association and Steel Can Recycling Institute.

Downturn Means Upturn in Coupon Clipping

The U.S. economic downturn is translating to an upturn in coupon clipping, according to a survey commissioned by NCH Promotional Services, a division of NCH (Chicago).

About 890 of 1,000 people surveyed in January said they had changed their shopping behavior; 61 percent of those respondents said they increased their use of cents-off coupons. Half of those identified as primary grocery shoppers also cited an increase in private label products.

Statistics released last month showed that consumers had saved $3.32 billion with cents-off coupons in 1990. That's an increase of 6.4 percent from 1989 coupon-related savings, but flat in inflation-adjusted dollars. NCH statistics also showed that retailers received $567.2 million in coupon handling fees in 1990.

Restaurants an Expendable Luxury—Study

Some 40 percent of consumers who were asked what kinds of spending they'd cut back on when faced with hard times indicated that restaurant dinners would be among the first to go, according to a 1,995-person survey conducted by the Roper Organization. Other expendable luxuries included pleasure travel (37 percent), clothing (26 percent), hobbies (16 percent) and entertaining at home (12 percent).

Analysis of 350 product categories shows that the power of big brands has weakened in many categories compared with five years ago.

PREPARED BY
ROBERT DIETRICH

Leading national brands: three little words that once had a reassuring sound to supermarket executives who felt confident that their shelves were stocked with all the products that were exactly what their customers wanted to buy. But exactly how many leading brands does it take to dominate a category? The answer is ... it depends.

A walk down any supermarket aisle confirms how wide the variation can be when it comes to dominance of top brands from category to category. In one category, one powerhouse brand can pretty much carry the whole category, while in another we see a host of labels vying for shopper dominance.

The degree to which such variations exist over a wide range of product categories stocked by supermarkets was first explored by SUPERMARKET BUSINESS in our Third Annual Product Preference Study five years ago (June 1986). That report, using research made available exclusively to SB by Mediamark Research Inc. (MRI) (see page 28), answered questions about brand dominance, quickly, in a unique visual format designed to be useful to buyers/merchandisers, store managers, store planners and other supermarket executives. For example:

- What percentage of total volumetric sales is claimed for a specific product category by the #1, the #2 and the #3 brands, and by the three brands cumulatively?
- Given a specific sales goal (say to meet half of demand, two-thirds of demand, or three-quarters of demand), how many brands—counting from #1 on down—must be authorized and stocked to fulfill that goal?

The report was a still picture taken at that time. Since then, as readers of SB are aware, various waves have swept through the trade that could have had an impact on consumers, manu-

facturers and retailers vis-à-vis their attitudes to brands in various product categories. New product introductions have skyrocketed in the period since the first SB study, and show no signs of abating. Far from it. According to a recent report by Marketing Intelligence Services of Naples, N.Y., a new record of 15,879 new grocery and drugstore products were introduced in 1990, up 18.9 percent over 1989. What's a perennially shelf space-short buyer to do (besides raise slotting allowances)?

For a start, we believe it would be valuable to examine the brand authorization problem in the light of five-year trends:

- In which product categories is brand concentration increasing—meaning that the top three brands are claiming an even larger percentage of sales than five years ago? Or, stated in reverse, in which categories is the number of brands needed to meet a specific percent-of-sales goal becoming smaller? Where are there fewer brands, fewer slots, more space for the big sellers, and perhaps more room for really promising newcomers?
- And for which product categories is brand concentration decreasing—meaning that the share claimed by the top three brands has diminished, as consumer interest is diffused over a wider range of runners-up (which can also include a growth in interest in store brands for a specific product category)? The answer to this question implies, of course, that even more brands are needed than five years ago to meet a specific percentage share goal.

Over the past five years, coverage by the top three brands decreased in twice as many categories as the number of categories in which it increased. And many of the decreases were more than marginal.

As the chart below (bottom right) demonstrates, for 30.0 percent of categories time stood still and there was no change. As for the balance, twice as many (47.0 percent) saw top-three coverage decrease as saw it increase (23.0 percent). And many of the decreases were more than marginal, with half of them exceeding 15 percent.

Some of the prominent product categories in which brand concentration slipped most include spaghetti sauce, household cleaners and frozen desserts. On the other hand, substantial gain in top-three clout over the five years could be found in products ranging from denture adhesive and men's hair sprays to stuffing mixes and canned ham.

To provide an easy comparison of the number of brands that might be in demand in a particular product category, the tables show the number needed for each category to meet a 75 percent share, today, and five years ago. As the table (bottom left) shows, almost a quarter of categories demand 10 or more brands, while one in five need only one or two, with a median number of brands set at five. The dynamics of the changes over the five-year period suggest the constant need for re-evaluating the brand-authorization policies on a category-by-category basis.

The sensitivity of brand performance to outside influences could grow even greater in the near future, as strapped consumers reconsider their options. Will they make more private label or green line purchases? Will they have greater alertness to opportunities to buy established favorite brands with manufacturers' coupons or while on store special?

Whatever, this report proves that brand concentration has undergone some significant changes in recent times, awareness of which can help supermarket executives to maximize their space and merchandising resources.

Two Ends of the Brand Concentration Spectrum

(% of Sales by #1 Brand)

Ten Product Categories With Very High Concentration		Ten Product Categories With Very Low Concentration	
1. Stews, Canned	91.9	1. Deodorant, Women's	7.3
2. Energy Drinks	88.8	2. Shampoo, Women's	7.8
3. Hard Roll Candy	85.2	3. Cigarettes	8.2
4. Disposable Lighters	85.1	4. Cold/Sinus Remedies	8.3
5. Instant Breakfast	82.8	5. Bottled Water	9.0
6. Cream Cheese	81.7	6. Bread	9.5
7. Baby Shampoo	79.2	7. Candy, Ind., Reg.-Size	9.9
8. Oven Cooking Bags	78.7	8. Household Cleaners	10.5
9. Infant Cereal	77.7	9. Hair Conditioners, Men's	11.1
10. Toaster Products	76.5	10. Perfume/Cologne	11.1

Five-Year Trend in Brand Concentration

(Change in % of Sales by Top Three Brands)

Large Increases in Concentration		Large Decreases in Concentration	
Prepared Mixes, With Liquor	+87%	Dry Soup Mixes	-47%
Children's Cold Tablets/Liquids	+85	Breakfast/Snack/Nutritional Bars	-45
Detergent/Soap, Reg. Laundry	+52	Spaghetti Sauce	-44
Denture Adhesive	+45	Hair Mousse, Women's	-43
Motor Oil Additives	+44	Orange Juice, Not Frozen	-38
Vitamins, Children's	+37	Desserts, Frozen	-38
Bath/Shower Additives,Women's	+37	Orange Juice, Frozen	-38
Ham, Canned	+30	Baking Mixes	-37
Pressed Powder, Women's	+29	Household Cleaners	-36
Shaving Creams, Men's	+25	Chicken, Breaded, Frozen	-34
Hair Spray, Men's	+24	Disposable Diapers	-34
Extracts	+24	Rice, Flavored/Seasoned	-32

Number of Brands Required to Meet 75%-of-Sales Goal

(% of Product Categories)

One Brand	4.1%
Two	14.3
Three	14.0
Four	10.2
Five	9.9
Six	6.8
Seven	7.2
Eight	4.1
Nine	5.1
Ten	5.1
11-15	11.6
16-20	4.4
Over 20	3.1
TOTAL	**100.0%**

Change in Number of Brands Needed to Meet 75%-of-Sales Goal

(Today vs. Five Years Ago)

More Brands Today		
3 or more	14.9%	
1 or 2	26.4	
		(41.3%)
No Change		(31.0%)
Few Brands Today		
1 or 2	20.2%	
3 or more	7.5	
		(27.7%)
TOTAL		100.0%

Change in Sales Coverage of Top Three Brands

(Today vs. Five Years Ago)

Coverage Decreased		
20% or more	13.6%	
15 to 19.9%	10.4	
10 to 14.9%	10.1	
5 to 9.9%	12.9	
TOTAL		(47.0%)
No Change in Coverage		(30.0%)
Coverage Increased		
5 to 9.9%	9.4%	
10 to 14.9%	4.5	
15 to 19.9%	2.1	
20% or more	7.0	
		(23.0%)
TOTAL		100.0%

How to Read the Tables

The demographic base for a particular product category is the one that is responsible for making most of the purchases of that category. For most food categories, the base is FEMALE HOMEMAKERS. Other groups that are found in this report are ADULTS (for categories used by both sexes, including tobacco, soft drinks, wine and non-sex-specific HBA) and MEN and WOMEN, matched to their appropriate HBA product usage.

Compared to five years ago, the degree of brand concentration (indicated by sales share of the top three brands) may have increased, decreased or remained static. Here, for the first time, that comparison is empirically made through the use of historic Mediamark data. In the case of canned cat food, the concentration has dropped from a 64.9% top-three-brand cumulative share to only 49.6%.

How many brands are "enough" for a warehouse or store to stock? Here that question is answered in relation to various degrees of "enough" left to the discretion of the reader. The number of brands (counting down from the largest, of course) that must be stocked to cover 50% of volumetric sales, 67% of sales and 75% of sales are all shown. Deciding, for example, to carry the brands that account for 75% of sales would mean carrying six brands of canned cat food, only three brands of moist cat food, but 14 brands of dry cat food. (A further complicating factor, of course, is the number of items—flavors, sizes or other variations—within a brand.)

The number of brands needed to satisfy, say, a 75%-of-sales goal has changed for many product categories over the past five years. As brand concentration decreases (less clout by the top brands) more brands must be authorized to attain a set sales goal. In the case of canned cat food, that means that the five brands that were sufficient to cover 75% of demand five years ago must now be increased to six. Among pet products there is no category where fewer brands will suffice today than sufficed five years ago. Most categories demand even more brands. Such movement is often a reflection of ongoing and dynamic new product introduction activity.

PET PRODUCTS (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1 #2 #3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Cat Food, Canned	18.1 17.6 13.9	49.6	64.9	-23.6	4	5	6	5	+1	
Cat Food, Dry	13.0 12.6 8.2	33.8	44.3	-23.3	6	10	14	10	+4	
Cat Food, Moist	45.6 19.9 13.6	79.1	80.4	-1.6	2	3	3	3	0	
Dog Food, Canned	20.2 18.1 11.1	49.4	59.1	-16.4	4	7	8	5	+3	
Dog Food, Dry	12.7 6.0 5.0	23.7	30.2	-21.5	12	—	—	—	—	
Dog Food, Moist	24.6 21.8 13.8	60.2	71.3	-15.6	3	4	5	—	—	
Cat Litter	19.5 15.6 12.5	47.6	48.4	-1.7	4	6	—	—	—	
Dog Biscuits/Treats	26.5 12.1 9.4	48.0	54.2	-11.4	4	7	9	6	+3	
Flea/Tick Care Products	28.8 26.5 8.2	63.5	78.1	-18.7	2	4	5	3	+2	
Cat Treats	38.1 22.6 19.6	80.3	—	—	2	3	3	—	—	
AVERAGE	24.7 17.3 11.5	53.5								

Participants in the Mediamark survey who used the products in a particular category over a set period (usually the previous six months) are asked to indicate the quantities of the product they used—by brand. Special MRI computer programs then use these data to "weight" brand share by volume, thus yielding each brand's percent contribution to total category sales volume. As shown here the respective sales shares of the three leading brands of canned cat food are: 18.1%, 17.6% and 13.9%, for a cumulative three-brand share of 49.6%. Within a certain section, the three-brand share can vary a great deal. In pet foods, for example, it ranges from a low of 23.7% for dry dog food to a high of 80.3% for cat treats.

Shown symbolically here is each category's brand concentration relative to the almost 350 categories shown in this report. The share of sales accounted for by the top three brands has been arrayed from highest to lowest and then divided into quintiles as follows (see legend at bottom of each chart page):

- Far Above Average — Above 81%
- Above Average — 65.1 to 80.9%
- Average — 51.6 to 65.0%
- Below Average — 38.1 to 51.5%
- Far Below Average — Under 38.1%

Note: Median brand concentration is 58.3%.

While decisions must be based on individual product categories (such as canned dog food) rather than on section averages (such as pet products), averages are shown to facilitate inter-department comparisons. The master chart on page 32 ranks all 36 categories according to the degree of penetration achieved by the three leading brands.

Too Many Brands in One Category? Too Few in Another? How This Report Can Help You Make Decisions

"Everybody wants to get onto the shelf." That alteration of a Jimmy Durante signature line is the brand authorization problem as seen from the buyer's side of the desk.

Well, just how many brands do belong on the shelf for a given product category? According to what standard? And is that number greater or smaller than it was a few years ago? Buyers severely limit brand authorizations for particular product categories for many good reasons.

Excess brands waste time in ordering and restocking, and waste money in the form of underutilized inventory dollars. Just as serious, of course, is freezing out a brand whose presence is integral to attaining a targeted percent of total sales. Even in categories with high concentration, the addition of Brand #4 or #5 may be necessary to raise the brand mix to a level where it satisfies the target sales goal.

To put your brand mix into perspective, here are a few points to keep in mind while reading this report:

•Don't take the leading brands in high-concentration categories for granted. Yes, these big guns are long-term leaders, but they still need constant nurturing to perform at full speed. Start by making sure they're given a generous amount of shelf space, precluding those out-of-stock holes in the shelf that shoppers abhor—and that you should, too. And be especially alert to notices of these brands' future appearances in coupon promotions, so that you order up and avoid disappointing coupon-clutching customers.

•For categories where brand concentration has eroded over the past five years, consider opening the door for some former freeze-outs. For 41.3 percent of all product categories for which five-year comparisons are available, the number of brands needed to meet a 75 percent-of-sales goal has grown over the past five years.

But perhaps your brand offerings haven't always expanded in tandem. Some of the follow-the-leader brands have been carving out their own franchises among consumers, so maybe it's time to show them some respect. Make some space on the shelf for them at the expense of the shrinking leaders.

•How do house brands fit in with the brand concentration trends shown in this report? Because of the wide variation in penetration of private label and generics due to variations in their strength from company to company and region to region, they're omitted from this report. (Mediamark does report private label and generic sales for subscribers to its reports, however.)

There are, however, some indications of private label activity that can be assumed from this report. For categories where no #3 brand is reported, the remainder of the sales pie is probably divided among private label and small local brands.

Another indicator is when the column showing the number of brands necessary to fulfill a 75 percent-of-sales goal is blank. This suggests that the sales of the national brands reported by Mediamark add up to less than 75 percent, with the remaining 25 percent or more allocated to private label, generic and small local brands.

Where this report shows either an increase or decrease in brand concentration for a particular category, no doubt your in-house reports will be able to relate this to a change (in either direction) in your store brands.

The Mediamark Database All About Brands—And Much More

Subscribers to Mediamark Research Inc.'s (MRI) database value the currency of the data as an aid to making decisions. What are consumers buying now? How much? Which brands? And how does that relate to their media habits of the moment—what they read, watch and listen to?

More than 700 companies subscribe annually to Mediamark's syndicated reports. They use the data primarily to support the placement of advertising through target marketing, for user profiles, and for geodemographic and lifestyle analyses.

As Mediamark progresses into its second decade, there is also value to be found in the historical, as well as the current, perspective its resources can provide, with its vast store of comparable, nationally projectable data amassed from hundreds of thousands of respondents over many years.

MRI derives its data from annual national probability surveys of 20,000 individuals who participate in both personal and self-administered surveys that cover demographics, product usage and media exposure of all persons 18 and over.

Statistics are compiled on 3,500 product categories and services, and on 5,700 individual brands. Basic product usage and media data are published annually in 20 volumes, but many subscribers prefer to tap into the base directly through MRI's PC-based MEMRI system or through on-line access.

Mediamark also offers several customized services that are especially useful in today's marketing environment:

•**Ten Mediamark Reports.** Consumer habits in markets that include New York and Los Angeles are broken out.

•**Business-to-Business Report.** Business purchasers are identified, as well as what they spend the company's money on and how much. Advertising, equipment and supplies and travel are among the purchases covered.

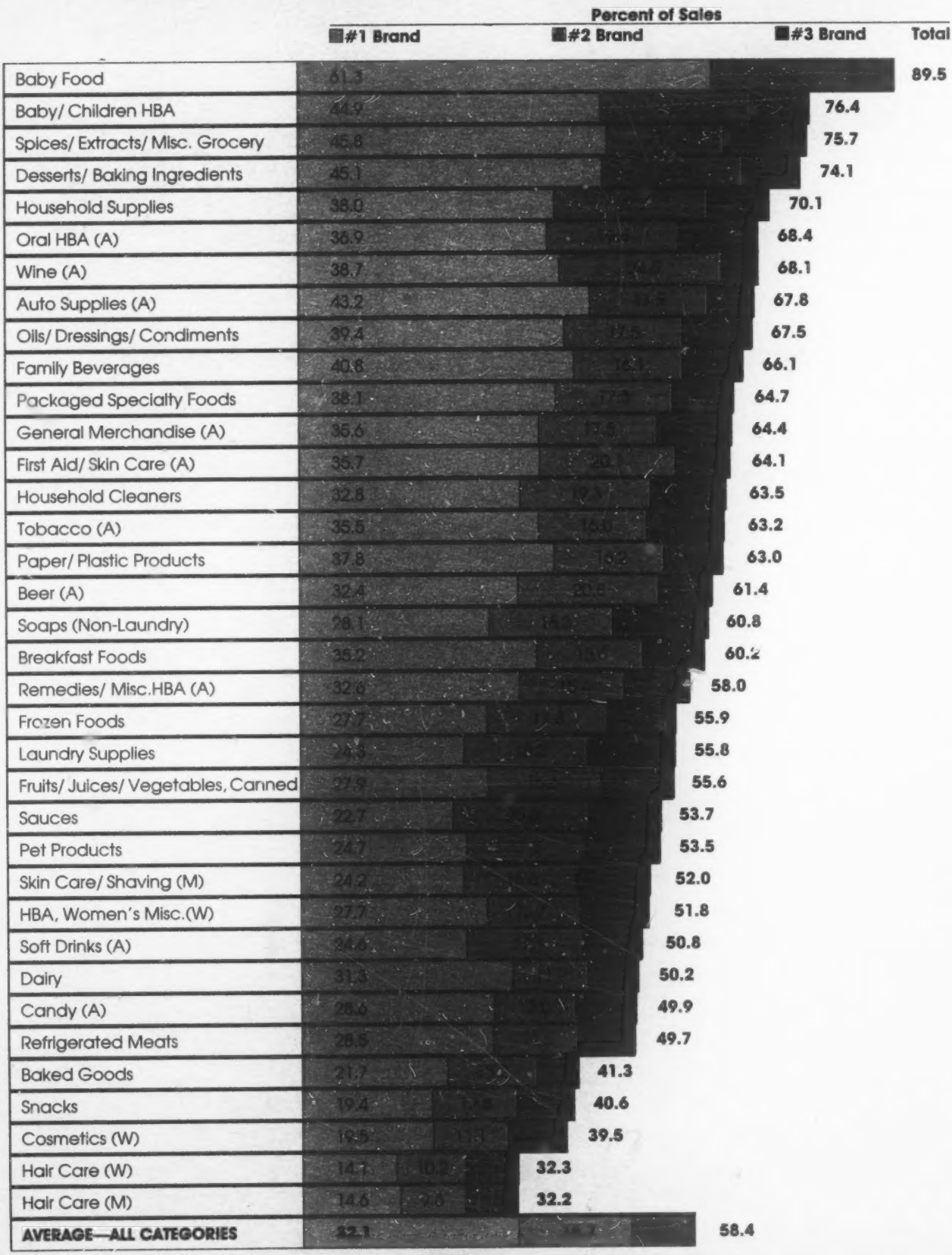
•**The Upper Deck Report.** This tracks how the influential richest 10 percent of American households spends its money.

In addition to syndicated services, Mediamark also has a custom division that conducts research services for a wide variety of clients. For information, contact Mediamark Research Inc., 708 Third Avenue, New York, N.Y. 10017, or call (212) 599-0444.

Note: The MRI data presented in this report are under copyright by Mediamark Research Inc. and are presented here with their permission.

BRAND SHARE BY CATEGORY

Ranking of Brand Concentration for 36 Major Product Classes



Base Groups: (A) Adults; (M) Men; (W) Women. All others are based on Female Homemakers.

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BRAND SHARE BY CATEGORY

DRY GROCERY—FOOD

BABY FOODS

(BASE = FEMALE HOMEMAKERS)

	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Baby Foods	73.3	17.3	6.4	97.0	90.6	+7.1	1	1	2	3	-1	●
Infant Cereal	77.7	12.7		90.4	98.4	-8.1	1	1	1	2	-1	●
Infant Formulas/Prepared	32.9	31.4	16.7	81.0	79.2	+2.2	2	3	3	3	0	●
AVERAGE	61.3	20.5	7.7	89.5								

As they did five years ago, baby foods lead all other product classes in the percent of sales coverage achieved by the top three brands (89.5%). While the #1 brands dominate both baby foods and infant cereals, the runner-up brands make a strong showing in infant formulas.

BAKED GOODS

(BASE = FEMALE HOMEMAKERS)

	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Bread	9.5	4.4	3.9	17.8	19.3	-7.8	17	35	—	—	—	○
Bread Crumbs/Coating Mixes	20.5	14.1	8.1	42.7	41.9	+1.9	5	7	9	10	-1	◔
Cookies, Ready-to-Eat	14.0	10.9	5.9	30.8	36.6	-15.8	8	14	19	12	+7	○
Crackers	12.0	7.4	7.1	26.5	32.5	-18.5	8	13	18	13	+5	○
English Muffins	45.1	9.5	6.2	60.8	57.3	+6.1	2	5	—	—	—	◐
Snack Cakes	44.8	27.2	8.7	80.7	80.3	+0.1	2	2	3	3	0	◕
Stuffing Mixes/Products	48.1	11.4	7.6	67.1	54.8	+22.4	2	3	5	9	-4	◕
Sweet Rolls/Pastries, Ready-to-Eat	28.0	20.8	3.7	52.5	—	—	3	—	—	—	—	◐
AVERAGE	21.7	13.2	6.4	41.3								

For the dominant members of baked goods, categories such as bread, cookies and crackers, the motto for space allocation might well be the more the merrier. To meet even the 50%-of-sales goal for bread, 17 brands are needed and the number rises to 35 to achieve a 67% goal. (Store labels, which are not counted individually in this study, help to diffuse brand concentration further.) As new items have continued to roll out for both cookies and crackers over the past five years, brand concentration has weakened significantly. Exceptions are English muffins, snack cakes and stuffing mixes, all of which have dominant #1 brands that account for almost half of sales.

BREAKFAST FOODS

(BASE = FEMALE HOMEMAKERS)

	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Breakfast Cereals, Cold	9.4	8.1	4.4	21.9	22.9	-4.4	16	40	—	27	—	○
Breakfast Cereals, Hot	19.2	18.2	12.3	49.7	55.2	-10.0	4	6	7	7	0	◔
Breakfast/Snack/Nutritional Bars	12.2	11.7	10.0	33.9	61.8	-45.1	5	7	9	5	+4	○
Toaster Products	76.5	8.9	3.5	88.9	83.0	+7.1	1	1	1	2	-1	●
Table Syrup/Molasses	18.1	17.5	15.0	50.6	51.9	-2.5	3	6	8	7	1	◔
Pancake/Waffle Mix	32.8	28.4	9.9	71.1	67.4	+5.4	2	3	4	4	0	◕
Honey	44.4	13.0	4.3	61.7	56.6	+9.0	2	—	—	—	—	◐
Jams/Jellies	26.9	21.4	12.7	61.0	57.0	+7.0	3	6	—	—	—	◐
Peanut Butter	29.4	23.2	22.0	74.6	73.7	+1.2	2	3	4	4	0	◕
Instant Breakfast	82.8	5.9		88.7	—	—	1	1	1	—	—	●
AVERAGE	35.2	15.6	9.4	60.2								

As those charged with space allocation for breakfast foods will readily acknowledge, one of their most challenging assignments is cold breakfast cereals. Just to meet 67% of demand, 40 different brands must be given their due. And with the never-ending parade of new products marching into this section, the names of those top 40 keep changing.

One of the most stable product categories over the past five years has been peanut butter, with 74.6% of demand met by the top three brands, all of which have shares in the twenties. The product categories most dominated by a single brand are toaster products (76.5%) and instant breakfasts (82.8%), making it difficult for challengers to wedge their way into these sections.

THE FIVE QUINTILES:

● Far above average—Above 81%
◕ Above average—65.1 to 80.9%
◐ Average—51.6 to 65%
◔ Below average—38.1 to 51.5%
○ Far below average—Under 38.1%

Source: Mediamark Research Inc.

BRAND SHARE BY CATEGORY

CANDY (BASE = ADULTS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCEN-TRATION QUINTILE
Candy, Individual, Regular Size	9.9	8.0	6.2	24.1	26.4	-8.7	9	18	25	18	+7	○
Candy, Individual, Big Block/Thick Bar	17.1	11.4	9.5	38.0	—	—	5	8	9	—	—	○
Candy, Miniature, Packaged	10.9	10.6	10.0	31.5	27.1	+16.2	6	11	13	14	-1	○
Candy, Prepack.,Loose	20.3	13.3	11.6	45.2	48.4	-6.6	4	7	9	9	0	◔
Chewing Gum	12.4	10.2	9.9	32.5	37.5	-13.3	5	8	10	9	+1	○
Cough Drops	59.2	8.1	5.3	72.6	72.1	+0.7	1	2	4	4	0	◕
Hard Roll Candy	85.2	6.7	3.0	94.9	96.6	-1.8	1	1	1	1	0	●
Mints	18.8	16.8	15.5	51.1	54.9	-6.9	3	5	5	5	0	◔
Boxed Chocolates	23.5	23.0	12.6	59.1	—	—	3	4	6	—	—	◑
AVERAGE	28.6	12.0	9.3	49.9								

"Candy, Individual, Regular-Size" is a formal definition for those treats that are found near the checkout counter, of which almost everyone has a particular favorite. No substitutions, please. As a result, 25 different brands must be stocked to meet 75% of demand, up substantially from only 18 five years ago. Patronage is also spread widely among chewing gum brands, with 10 brands needed to meet 75% of demand.
The situation is quite the opposite for hard roll candy, where only one brand satisfies an impressive 85.2% of demand, a pre-eminence virtually unchanged over many years.

CANNED FRUITS/ JUICES/VEGETABLES (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCEN-TRATION QUINTILE
Beans, Prepared in a Sauce	25.7	16.2	9.7	51.6	71.4	-27.7	3	5	7	4	+3	◑
Fruit, Canned/Jarred	30.7	13.2	9.5	53.4	59.7	-10.6	3	5	10	7	+3	◑
Fruit Juices/Drinks, Misc.	9.9	8.0	7.9	25.8	27.3	-5.5	8	15	20	19	+1	○
Grapefruit Juice	19.1	18.8	13.2	51.1	48.1	+6.2	3	5	—	—	—	◔
Mushrooms, Canned/Jarred	26.5	20.2	16.2	62.9	58.9	+6.8	3	5	—	—	—	◑
Tomatoes, Canned	31.1	18.8	18.5	68.4	69.1	-1.0	3	3	—	—	—	◕
Tomato/Vegetable Juices	54.9	18.8	6.6	80.3	70.5	+13.9	1	2	3	4	-1	◕
Vegetables, Canned/Jarred	25.6	18.4	7.0	51.0	51.8	-1.5	3	8	14	17	-3	◔
AVERAGE	27.9	16.6	11.1	55.6								

Few #1 brands show outstanding leadership positions here, as national brands battle it out with both each other and traditionally strong store brands. The exception to this rule is tomato and vegetable juices, where #1 accounts for 54.9% of sales volume, and concentration has grown over the past five years. Many of these categories are strongly promoted by both store advertising and instore displays week in and week out, challenging the brand loyalty of price-conscious consumers.

DESSERTS/BAKING INGREDIENTS (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCEN-TRATION QUINTILE
Artificial Sweeteners	53.4	32.5	6.1	92.0	88.7	+3.7	1	2	2	2	0	●
Baking Chips	49.1	17.8	11.5	78.4	85.6	-8.5	2	3	3	2	+1	◕
Baking Chocolate, Bar	41.9	29.2	12.8	83.9	90.3	-7.1	2	2	3	2	+1	●
Baking Coconut	75.8		7.8	83.6	86.4	-3.3	1	1	1	1	0	●
Baking Mixes	23.2	11.3	8.6	43.1	68.9	-37.5	4	8	10	4	+6	◔
Brownie/Cookie Mix	33.5	24.4	13.6	71.5	62.7	+14.0	2	3	4	5	-1	◕

Of the 17 product categories included here, most show a pattern of a few favorite brands dominating sales. In fact, for seven of these categories only one or two brands are needed to satisfy 75% of demand, simplifying space allocation. Two classic categories where the name of the #1 brand is virtually synonymous with the category itself are shortening and baking coconut. Many consumers go through life virtually unaware that competing brands even exist.

THE FIVE QUINTILES:
● Far above average—Above 81%
◕ Above average—65.1 to 80.9%
◑ Average—51.6 to 65%
◔ Below average—36.1 to 51.5%
○ Far below average—Under 36.1%

Source: Mediamark Research Inc.

BRAND SHARE BY CATEGORY

DESSERTS/BAKING INGREDIENTS (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Cake Mixes, Dry	27.5	21.9	15.8	65.2	78.1	-16.5	3	4	5	3	+2	
Evaporated Milk	39.1	17.4	15.4	71.9	67.0	+7.3	2	3	4	—	—	
Flour	43.5	22.7	8.3	74.5	73.3	+1.6	2	3	4	4	0	
Frosting/Frosting Mixes	26.6	19.8	12.9	59.3	65.9	-10.0	3	4	5	5	0	
Gelatin/Gelatin Desserts	57.2	24.4	7.5	89.1	91.0	-2.1	1	2	2	2	0	
Pizza Mix	56.9	22.7	7.9	87.5	72.5	+20.7	1	2	2	4	-2	
Puddings/Pie Fillings	32.8	13.8	11.7	58.3	76.4	-33.7	3	5	7	3	+4	
Shortening	61.5	14.3	3.5	79.3	81.9	-3.2	1	2	2	1	+1	
Sugar	25.5	16.3	5.9	47.7	50.9	-6.3	4	—	—	—	—	
Whipped Topping	45.3	23.6	8.4	77.3	69.4	+11.4	2	2	3	4	-1	
Yeast	74.0		23.6	97.6	—	—	1	1	2	2	0	
AVERAGE	45.1	20.2	8.8	74.1								

Gelatin desserts have only slightly more diffusion, with a strong #2 brand (24.4%) following on the heels of #1 (57.2%).

A category that has become significantly less focused on the leaders over the past five years is baking mixes, where share of the top three brands has fallen severely from 68.9% to 43.1%, eroded no doubt with the help of avalanches of new product introductions, including those aimed at microwave bakers. In contrast the pizza mix category has tightened up, with the three leaders claiming a 20.7% larger share of sales than was the case five years ago.

OILS/DRESSINGS/ CONDIMENTS (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Catsup	48.9	23.4	13.8	86.1	86.4	-0.3	2	2	3	3	0	
Mayonnaise/Mayo-Type Dressing	33.5	22.1	15.9	71.5	70.1	+2.0	2	3	4	4	0	
Mustard	46.3	10.9	8.6	65.8	67.7	-2.8	2	4	5	4	+1	
Oil, Salad or Cooking	23.9	22.4	16.7	63.0	64.4	-2.2	3	4	5	6	-1	
Pickles	32.0	14.9	12.0	58.9	60.3	-2.3	3	5	7	7	0	
Pickle Relish	55.3	24.6	3.5	83.4	80.8	+3.2	1	2	2	2	0	
Salad Dressings	15.0	11.4	9.1	35.5	48.5	-26.8	5	8	10	7	+3	
Salad Toppings	24.9	22.1	12.9	59.9	—	—	3	4	5	—	—	
Vinegar	75.0		6.1 3.0	84.1	—	—	1	1	1	—	—	
AVERAGE	39.4	17.5	10.6	67.5								

Specials on mayonnaise come, and specials on mayonnaise go, but over the long run of five years the share of sales registered by the top three brands sticks at virtually the exact same level (71.5% today versus 70.1% five years ago).

Strong #1 brands are commonplace in this section, with catsup (48.9%), mustard (46.3%), pickle relish (55.3%) and vinegar (75.0%) some outstanding examples. Brand concentration has weakened most for salad dressings, where stores must now stock 10 brands to meet 75% of demand, up from only seven brands five years ago.

PACKAGED SPECIALTY FOODS (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Chicken, Canned	58.7	18.6	17.3	94.6	—	—	1	2	2	1	+1	
Chili, Canned	36.2	15.9	12.9	65.0	77.2	-15.8	2	4	5	3	+2	
Deviled Ham/Other Meat Products	35.9	20.0	12.5	68.4	58.6	+16.7	2	3	4	5	-1	

The only high-volume product category to show an increase in brand concentration is packaged pasta, where 42.6% of sales volume can be met by the top three brands, up from only 37.9% five years ago.

THE FIVE QUINTILES:

- Far above average—Above 81%
- Above average—65.1 to 80.9%
- Average—51.6 to 65%
- Below average—38.1 to 51.5%
- Far below average—Under 38.1%

Source: Mediamark Research Inc.

BRAND SHARE BY CATEGORY

PACKAGED SPECIALITY FOODS (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Prep. Dishes, Dinner Mixes, Packaged	41.0	14.4	8.8	64.2	80.1	-19.9	2	4	5	3	+2	
Hash, Canned	60.7		29.9	90.6	—	—	1	2	2	2	0	
Mexican Foods	24.3	16.8	10.4	51.5	53.7	-4.1	3	7	9	10	-1	
Pasta, Canned/Jarred	47.1		29.3 5.6	82.0	90.3	-9.2	2	2	2	2	0	
Potatoes, Instant	26.5	19.8	10.8	57.1	58.7	-2.7	3	5	7	6	+1	
Pasta, Packaged	16.8	15.8	10.0	42.6	37.9	+12.4	4	9	11	16	-5	
Rice	23.8	9.9	8.0	41.7	49.5	-15.8	5	8	10	10	0	
Rice, Flavored/Seasoned	14.5	13.6	12.3	40.4	59.7	-32.3	4	6	7	5	+2	
Soup, Canned	51.0		12.7 7.0	70.7	83.2	-15.0	1	3	4	2	+2	
Soup, Dry/Bouillon Cubes	12.2	10.1	8.4	30.7	58.0	-47.1	7	10	11	6	+5	
Tuna, Canned	31.2	28.8	15.1	75.1	77.0	-2.5	2	3	3	3	0	
Stews, Canned	91.9		3.9	95.8	—	—	1	1	1	1	0	
AVERAGE	38.1	17.3	9.3	64.7								

However, buyers whose goal is to satisfy 75% of demand are still faced with making room with 11 brands in all. The only other products that require a double-digit number of brands are rice and dry soup. Dry soup has evolved in the direction of less brand concentration as new products have surfaced, with the share of the top three plummeting from 58.0% to 30.7%.

One of the most popular categories in this group, canned tuna, requires only three brands to meet 75% of demand, the same as five years ago.
Looking out for the #1 brand by giving it an appropriate amount of shelf space is particularly important in the case of both canned stews (91.9% share for #1) and canned hash (60.7%).

REFRIGERATED MEATS (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Bacon/Breakfast Strips	15.1	7.0	6.2	28.3	33.9	-16.5	10	18	—	21	—	
Cold Cuts	19.0	11.5	6.2	36.7	37.9	-3.2	5	—	—	—	—	
Cornish Hens	48.8		26.5 16.0	91.3	—	—	2	2	2	—	+2	
Frankfurters/Wieners	23.1	6.5	5.1	34.7	33.8	+2.7	7	12	16	25	-9	
Ham, Canned	24.8	17.6	15.6	58.0	44.7	+29.8	3	4	5	9	-4	
Liver Sausage/Liverwurst	64.1		6.7 4.8	75.6	68.7	+10.0	1	2	3	—	—	
Pork Sausage	14.8	11.5	7.8	34.1	32.3	+5.6	7	12	—	—	—	
Chicken/Turkey, Fresh/Frozen	18.2	12.7	8.0	38.9	—	—	5	—	—	—	—	
AVERAGE	28.5	12.5	8.7	49.7								

This is one of the least concentrated of the dry grocery sections, with a lack of strong #1 brands the rule (except for liver sausage and Cornish hens).

Both bacon and frankfurters are strong, high-volume shopper lures, with a profusion of brands all claiming their limited shares for each. Bacon shows the weakest leadership at the top, with the three leading brand covering only 28.3% of demand, condemning it to the lowest quintile along with franks, cold cuts and pork sausage.

SAUCES (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Barbecue/Seasoning/Misc. Sauces, Bottled	15.1	12.7	9.0	36.8	44.3	-17.0	5	8	10	8	+2	
Gravy/Sauce Mixes	19.7	18.5	11.7	49.9	48.9	+2.0	4	5	6	6	0	
Soy Sauce	44.2		37.9 12.1	94.2	95.4	-1.3	2	2	2	2	0	

New product debuts in the spaghetti sauce category have diminished the clout of the top three brands, dropping their share of sales from 59.7% to 33.7%, while raising the number of brands that must be displayed to meet 75% of demand from six to 10 over five years. The strongest #1 brand is still in soy sauce.

THE FIVE QUINTILES:
- Far above average—Above 81%
- Above average—65.1 to 80.9%
- Average—51.6 to 65%
- Below average—38.1 to 51.5%
- Far below average—Under 38.1%

Source: Mediamark Research Inc.

BRAND SHARE BY CATEGORY

SAUCES (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Spaghetti Sauce	11.6	11.1	11.0	33.7	59.7	-43.6	5	8	10	6	+4	○
AVERAGE	22.7	20.0	11.0	53.7								

SNACKS (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Corn/Tortilla Chips & Cheese Snacks	16.7	11.7	8.5	36.9	45.2	-18.4	5	11	14	10	+4	○
Nuts	34.4	11.2	7.4	53.0	59.0	-10.2	3	7	—	—	—	◐
Popcorn Snacks/Popping Corn	17.1	11.4	9.4	37.9	45.5	-16.7	5	15	—	—	—	○
Potato Chips	16.4	16.3	6.6	39.3	45.9	-14.4	5	12	17	13	+4	◔
Pretzels	12.4	12.1	11.7	36.2	43.5	-16.8	5	7	—	8	—	○
AVERAGE	19.4	12.5	8.7	40.6								

The proliferation of different brands and varieties of snacks are enough to drive store managers and buyers, well, nuts. For all five individual brand categories share of sales claimed by the top three brands has thinned significantly over the past five years. For a popular category like potato chips, it now takes 17 brands to meet a 75%-of-sales goal, up from 13 five years ago.

SPICES/EXTRACTS/ MISC.GROCERY (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Extracts	47.1	18.5	11.3	76.9	62.1	+23.8	2	3	3	—	—	◕
Meat/Fish Extenders	47.3	22.9	12.4	82.6	—	—	2	2	3	1	+2	●
Nonstick Cooking Products, Aerosol	54.8	18.4	14.5	87.7	89.7	-2.2	1	2	3	2	+1	●
Salt	62.4	11.1	7.4	80.9	81.1	-0.2	1	2	3	3	0	◕
Salt Substitute	38.7	20.6	19.5	78.8	80.3	-1.9	2	3	3	3	0	◕
Seasonings/Spices	24.6	12.7	10.7	48.0	51.7	-7.2	4	6		8	-1	◔
AVERAGE	45.8	17.3	12.6	75.7								

Strong top-three brands are the rule here, with their average claim of sales exceeding 75%. Looking just at salt and aerosol non-stick cooking products, the #1 brands are among the strongest in the entire store, underlining the importance of never condoning any out-of-stocks here. Among seasonings top brands do not shine as brightly, partly because of the reluctance of store management to carry more than one or two lines and partly because of the presence of store brands.

FAMILY BEVERAGES (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Coffee, Ground	22.4	10.2	10.0	42.6	39.9	+6.8	5	10	14	11	+3	◔
Coffee, Instant or Freeze-Dried	21.7	15.7	10.0	47.4	44.7	+6.0	4	6	7	7	0	◔
Cream Substitute, Non-Dairy	54.3	16.5	8.6	79.4	81.7	-2.8	1	2	3	3	0	◕
Drink Additives (Add Milk or Water)	27.0	15.3	11.0	53.3	51.9	+2.7	3	5	6	7	-1	◐
Energy Drinks	88.8			88.8	—	—	1	1	1	—	—	●
Iced Tea Mix, Instant	25.6	20.9	12.4	58.9	76.6	-23.1	3	4	5	3	+2	◐
Milk, Dry	40.1	3.3		43.4	52.8	-17.8	—	—	—	—	—	◔

The battle for brand share is perpetually heated in the case of both ground and instant coffee, with all the major players launching barrages of merchandising and advertising ploys. If what they have in mind is protecting brand share, their strategy seems to be working, with the share of sales for both categories increasing (to 42.6% for ground coffee and to 47.4% for instant coffee) over the past five years. Still, it's not an easy section to manage with 14 brands of ground coffee needed to satisfy a 75%-of-sales goal.

THE FIVE QUINTILES:

● Far above average—Above 81%
◕ Above average—65.1 to 80.9%
◐ Average—51.6 to 65%
◔ Below average—38.1 to 51.5%
○ Far below average—Under 38.1%

Source: Mediamark Research Inc.

BRAND SHARE BY CATEGORY

FAMILY BEVERAGES

(BASE = FEMALE HOMEMAKERS)

	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Powdered Fruit/Soft Drinks	43.4	16.5	9.1	69	60.2	+14.6	2	3	4	7	-3	
Tea, Instant	52.1		40.6	92.7	87.6	+5.8	1	2	2	2	0	
Tea, Regular	34.6	9.7	8.5	52.8	56.5	-6.5	3	5	7	9	-2	
Coffee, Instant, Int'l Flav.	23.0	13.2	11.9	48.1	—	—	4	6	7	—	—	
Cocoa Powder	57.0		21.3 14.9	93.2	—	—	1	2	2	—	—	
Iced Fruit Tea, Instant	40.4	26.7	23.7	90.8	—	—	2	2	3	—	—	
AVERAGE	40.8	16.1	9.2	66.1								

A different trend is evident in heavily promoted iced tea mixes, with more brands needing to be stocked today as the share of the top three brands shrank from 76.6% to 58.9% over five years. Looking for a category with a clear head-above-the-crowd winner? Look no further than energy drinks, where #1 has fought off challengers to maintain an 88.8% share of volume.

SOFT DRINKS

(BASE = ADULTS)

	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Cola Drinks, Diet	35.8	16.9	13.1	65.8	63.2	+4.1	2	4	4	5	-1	
Cola Drinks, Reg., Non-Diet	36.0	35.6	4.1	75.7	82.2	-7.9	2	2	3	2	+1	
Soft Drinks, Diet (Non-Cola)	27.5	9.6	7.7	44.8	43.6	+2.8	4	7	11	11	0	
Soft Drinks, Regular (Non-Cola)	14.5	14.3	12.9	41.7	36.9	+13.0	5	8	12	14	-2	
Water, Bottled	9.0	9.0	7.7	25.7	33.5	-23.3	7	10	12	—	—	
AVERAGE	24.6	17.1	9.1	50.8								

The two main schisms here are: cola versus non-cola and diet versus regular. Regarding the matter of brand concentration, the former seems the most influential, with both colas able to meet 75% of demand with only three or four brands while about a dozen are needed for non-colas. No strong brand leadership is evident in bottled water, where even the #1 brand meets only 9.0% of the sales goal.

BEER

(BASE = ADULTS)

	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Ale	47.0		31.1	78.1	69.0	+31.2	2	2	2	4	-2	
Beer, Reg. Domestic	35.3	8.4	6.0	49.7	46.8	+6.2	4	7	10	9	+1	
Beer, Imported	17.5	16.1	15.3	48.9	55.6	-12.1	3	6	8	6	+2	
Beer, Low-Calorie, Domestic	42.3	19.0	18.0	79.3	75.3	+5.3	2	3	3	3	0	
Malt Liquor	62.0		29.3 1.6	92.9	72.0	+29.0	1	2	2	4	-2	
AVERAGE	32.4	20.8	8.2	61.4								

When you're thinking of having more than one, you may be a space planner for the beer category. For regular beer 10 brands are needed to meet 75% of demand, with the number dropping only slightly to eight for imported beer. The picture is quite different for ale, low-alcohol beers and malt liquors, where only two or three brands can carry the day. Variations in local taste come strongly into play, of course.

WINE

(BASE = ADULTS)

	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Wine/Spirits Coolers	26.6	26.2	8.4	61.2	—	—	2	5	9	—	—	
Wine, Domestic Dinner/Table	19.4	9.0	8.1	36.5	38.8	-5.9	6	12	18	20	-2	
Wine, Imported Dinner/Table	22.0	8.1	7.9	38.0	45.9	-17.2	5	9	11	—	—	

The night they invented domestic and imported table wine, they also invented a great conglomeration of brands and varieties. But 75% of demand can be met by stocking 18 brands of the former and 11 of the latter.

THE FIVE QUINTILES:

- Far above average—Above 81%
- Above average—65.1 to 80.9%
- Average—51.6 to 65%
- Below average—38.1 to 51.5%
- Far below average—Under 38.1%

Source: Mediamark Research Inc.

BRAND SHARE BY CATEGORY

WINE (BASE = ADULTS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Wine, Aperitif, Specialty	59.3	15.4	7.4	82.1	86.0	-4.5	1	2	3	3	0	●
Wine, Dessert/Port/Sherry	38.6	16.4	10.0	65.0	63.7	+2.0	2	4	5	5	0	◐
Wine, Party/Pop/Sangria	55.7		43.3	99.0	41.5	+138.6	1	2	2	7	-5	●
Wine, Sparkling/Cold Duck/Champagne	19.7	12.8	11.3	43.8	40.4	+8.4	4	8	11	—	—	◔
Vermouth	51.4		34.2	85.6	73.5	+16.5	2	2	2	4	-2	●
Prepared Mixed Drinks, Without Liquor	58.4	19.3	4.2	81.9	62.5	+31.0	1	2	2	4	-2	●
Prepared Mixed Drinks, With Liquor	53.3		38.0	91.3	48.7	+87.5	1	2	2	—	—	●
AVERAGE	38.7	24.0	5.7	68.4								

When you move down the aisle to such specialties as aperitif wines, sparkling wines and vermouth, however, there's a lot more leadership with all three categories qualifying for the top quintile of brand concentration.
In a relatively new category, wine and spirit coolers, some popular brands share the leadership, with no strong favorites leading the pack. Here buyers no doubt take soundings on variations in local tastes and stock what appeals to their particular clientele.

DRY GROCERY—NONFOOD

HOUSEHOLD CLEANERS (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Carpet/Rug Cleaners	20.5	19.0	18.2	57.7	59.9	-3.7	3	4	5	6	-1	◐
Drain Cleaners	38.6	27.7	23.5	89.8	85.8	+4.7	2	3	3	3	0	●
Floor/Wax Polish	38.3	18.6	7.3	64.2	59.7	+7.5	2	4	5	6	-1	◐
Household Cleaners	10.5	6.5	5.9	22.9	36.0	-36.4	9	14	16	11	5	○
Furniture Polish	33.9	15.7	10.7	60.3	55.1	+9.4	3	4	5	6	-1	◐
Toilet Bowl Cleaners, In-Bowl	27.5	14.3	9.7	51.5	60.1	-14.3	3	5	6	5	+1	◔
Toilet Bowl Cleaners, In-Tank	25.7	14.1	11.5	51.3	44.8	+14.5	3	5	7	6	+1	◔
Metal Polish	26.9	15.2	14.0	56.1	54.4	+3.1	3	5	6	6	0	◐
Oven Cleaners	50.1	15.6	9.3	75.0	76.6	-2.1	1	3	3	3	0	◕
Scouring Pads	41.9	39.3	4.0	85.2	85.6	-0.5	2	2	2	2	0	●
Scouring Cleansers	47.6	18.9	13.5	80.0	90.4	-11.5	2	3	3	2	+1	◕
Glass Cleaners	31.8	26.1	8.6	66.5	84.8	-21.6	2	4	5	2	+3	◕
AVERAGE	32.8	19.3	11.4	63.5								

Several of these categories boast leading brands as powerful as the cleaning-effectiveness promised by the ads for these products. Strong #1 brands can be found by strolling by the sections devoted to oven cleaners (50.1%), scouring cleansers (47.6%), scouring pads (41.9%) and drain cleaners (38.6%).

Backup #2 and #3 brands also pull their weight, so that about half of the products in this section need only two or three brands to meet a 75%-of-sales goal.

Household cleaners themselves are the most diffused category, with the top three brands adding up to only 22.9%. Here a variety of compounds positioned to zero in on specific cleaning needs fight it out for the consumer's attention.

HOUSEHOLD SUPPLIES (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Charcoal	51.2	15.9	12.1	79.2	—	—	1	2	3	—	—	◕
Tape, Transparent	58.5	24.0	4.3	86.8	91.0	-4.6	1	2	2	2	0	●

Many of the brands that are found in the household supplies section are true household names themselves.

THE FIVE QUINTILES:
● Far above average—Above 81%
◕ Above average—65.1 to 80.9%
◐ Average—51.6 to 65%
◔ Below average—38.1 to 51.5%
○ Far below average—Under 38.1%

Source: Mediamark Research Inc.

BRAND SHARE BY CATEGORY

HOUSEHOLD SUPPLIES (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Insecticide, Indoor	33.7	14.1	10.8	58.6	69.2	-15.3	3	5	6	5	+1	
Insect Repellent	33.3	28.5	17.4	79.2	81.1	-2.3	2	3	3	3	0	
Light Bulbs	35.5	13.9	13.1	62.5	73.8	-15.3	3	4	5	4	+1	
Insecticide, Outdoor	28.7	22.2	17.2	68.1	78.0	-12.7	2	3	4	3	+1	
Rubber Gloves	47.8		36.1	83.9	86.3	-2.8	2	2	2	1	+1	
Air Freshener Sprays/Room Deodorizers	15.8	14.1	9.5	39.4	41.9	-6.0	5	8	10	9	+1	
Water Conditioners	37.4		35.7	73.1	85.4	-14.4	2	2	—	2	—	
AVERAGE	38.0	22.7	9.4	70.1								

That is certainly the case in transparent tape, where #1 stakes out 58.5% of sales. In both rubber gloves and charcoal the #1 brand preempts an impressive half of all sales. Among the nine categories represented here, not one has experienced an increase in brand concentration over the past five years, evidence that some strength has sapped out of the leaders to the profit of their challengers.

The only category with a high degree of diffusion among several brands is air fresheners, with only 39.4% of sales attributed to the top three brands, and an above-average 10 brands required to meet a 75%-of-sales goal.

LAUNDRY SUPPLIES (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Bleach	30.8	21.7	19.3	71.8	77.9	-7.8	2	3	4	3	+1	
Fabric Softener	26.4	24.4	13.9	64.7	63.0	+2.7	2	4	5	5	0	
Detergent/Soap, Regular Laundry	22.5	8.1	7.6	38.2	25.2	+51.6	6	9	13	17	-4	
Detergent./Soap, Fine Fabrics	18.6	17.1	7.5	43.2	49.5	-12.7	5	8	11	11	0	
Starch	25.7	19.5	19.0	64.2	63.6	+0.9	3	4	4	4	0	
Laundry Pre-Treatments/Cleaners	21.9	18.3	12.5	52.7	50.2	+4.9	3	5	6	6	0	
AVERAGE	24.3	18.2	13.3	55.8								

The scattershot brand shares among regular laundry detergents that was evident five years ago has abated as the top three brands have gained in strength from a combined 25.2% share to 38.2% today. This means that the number of brands needed to meet 75% of demand has eroded from 17 to an easier-to-handle 13. Powerhouse #1 brands are scarce here, with only bleach providing one with a 30%-plus share.

PAPER/PLASTIC PRODUCTS (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Aluminum Foil	67.7		11.4	79.1	83.8	-5.6	1	1	2	2	0	
Diapers, Disposable	21.3	19.3	13.2	53.8	81.2	-33.7	3	5	6	3	+3	
Household Wipes, Disposable	60.2		21.0	81.2	87.9	-7.6	1	2	2	2	0	
Cups, Disposable	54.4	13.9	3.7	72.0	82.1	-12.3	1	2	4	2	+2	
Plates, Disposable	16.2	13.4	12.1	41.7	41.9	-0.5	5	—	—	—	—	
Facial Tissue	25.5	14.4	12.0	51.9	58.7	-11.5	3	5	7	6	+1	
Oven Cooking Bags	78.7		18.1	96.8	92.4	+4.7	1	1	1	1	0	
Paper Napkins	18.9	18.4	8.7	46.0	43.2	+6.5	4	7	9	11	-2	
Paper Towels	29.1	12.4	11.7	53.2	54.1	-1.7	3	6	8	9	-1	
Plastic Kitchen Wrap	24.2	21.7	20.8	66.7	76.3	-12.4	3	3	4	3	+1	

Overall, this is a section of the dry grocery department where store brands are often given the chance to compete effectively against national brands for shopper attention. That's one reason that categories like toilet paper, paper napkins and disposable plates show relatively low achievement by the top three brands.

Most paper and plastic categories have seen an erosion in the share claimed by the top three brands over the past five years, but none more dramatically than disposable diapers, where share has sunk from 81.2% to only 53.8% as mothers consider their new choices, usually new lines from the same manufacturers.

THE FIVE QUINTILES:
- Far above average—Above 81%
- Above average—65.1 to 80.9%
- Average—51.6 to 65%
- Below average—36.1 to 51.5%
- Far below average—Under 36.1%

Source: Mediamark Research Inc.

BRAND SHARE BY CATEGORY

PAPER/PLASTIC PRODUCTS (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Plastic Sandwich/Food. Storage/Freezer Bags	30.7	16.9	16.7	64.3	76.3	-12.7	3	4	6	3	+3	
Plastic Garbage Bags/Can Liners	16.4	15.3	14.3	46.0	61.9	-25.7	4	—	—	—	—	
Cleaning Wipes, Pre-Moistened	27.3	13.8	13.1	54.2	61.4	-11.7	3	5	6	5	+1	
Toilet Paper	24.4	15.6	7.2	47.2	46.4	+1.7	4	7	10	9	+1	
Waxed Paper	72.1		17.4 1.8	91.3	86.7	+5.3	1	1	2	2	0	
AVERAGE	37.8	16.2	9.0	63.0								

PET PRODUCTS (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Cat Food, Canned	18.1	17.6	13.9	49.6	64.9	-23.6	4	5	6	5	+1	
Cat Food, Dry	13.0	12.6	8.2	33.8	44.3	-23.3	6	10	14	10	+4	
Cat Food, Moist	45.6		19.9 13.6	79.1	80.4	-1.6	2	3	3	3	0	
Dog Food, Canned	20.2	18.1	11.1	49.4	59.1	-16.4	4	7	8	5	+3	
Dog Food, Dry	12.7	6.0	5.0	23.7	30.2	-21.5	12	—	—	—	—	
Dog Food, Moist	24.6	21.8	13.8	60.2	71.3	-15.6	3	4	5	—	—	
Cat Litter	19.5	15.6	12.5	47.6	48.4	-1.7	4	6	—	—	—	
Dog Biscuits/Treats	26.5	12.1	9.4	48.0	54.2	-11.4	4	7	9	6	+3	
Flea/Tick Care Products	28.8	26.5	8.2	63.5	78.1	-18.7	2	4	5	3	+2	
Cat Treats	38.1	22.6	19.6	80.3	—	—	2	3	3	—	—	
AVERAGE	24.7	17.3	11.5	53.5								

SOAPS, NON-LAUNDRY (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Automatic Dishwashing Detergent	29.5	22.2	14.0	65.7	76.8	-14.5	2	4	4	3	+1	
Dishwashing Detergent, Liquid	19.8	18.1	14.8	52.7	57.1	-7.7	3	5	6	5	+1	
Hand Cleaners, Heavy Duty	35.1	14.6	14.4	64.1	91.3	-29.8	3	4	4	3	+1	
AVERAGE	28.1	18.3	14.4	60.8								

But sometimes shoppers just feel happier with a tried and true brand leader. That is the case with aluminum foil, where the leading brand claims 67.7% of sales as well as in two categories where there are a limited number of brands competing for shopper attention—oven cooking bags and waxed paper.

Grocery buyers who feel they're dogged by an unrelenting procession of new product pitches will find proof here that it's not their imagination. As more new products have tried to squeeze their way onto store shelves and into the affections of pets and their owners, brand concentration has slipped seriously. For example, in canned cat food, the top three brands covered 64.9% of demand only five years ago, but just 49.6% today.

At the same time, stores have had to shoehorn a greater number of brands to satisfy 75% of demand. For dog biscuits that has meant authorizing nine brands rather than the six that proved sufficient five years ago. The most highly concentrated category at the moment is a relatively new one, cat treats, where the top three brands account for 80.3% of sales.

Both automatic dishwasher detergents and liquid dishwashing detergents have seen some erosion in brand concentration over the past five years. So both now require that more brands be carried to fulfill a 75%-of-sales goal.

THE FIVE QUINTILES:

- Far above average—Above 81%
- Above average—65.1 to 80.9%
- Average—51.6 to 65%
- Below average—38.1 to 51.5%
- Far below average—Under 38.1%

Source: Mediamark Research Inc.

BRAND SHARE BY CATEGORY

TOBACCO

(BASE = ADULTS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Cigarettes	8.2	5.3	4.1	17.6	18.9	-6.9	20	37	50	44	+6	○
Cigars*	20.8	10.6	9.5	40.9	42.6	-4.0	4	—	—	—	—	◔
Chewing & Smokeless Tobacco*	30.2	27.9	23.2	81.3	70.2	+15.8	2	3	3	4	-1	●
Disposable Lighters	85.1		9.9	95.0	95.2	-0.2	1	1	1	1	0	●
Cigarette Rolling Paper	33.3	26.1	21.5	81.0	—	—	2	3	3	—	—	●
AVERAGE	35.5	16.0	11.7	63.2								

*BASE = MEN

Although nominally classified as part of the tobacco category, cigarettes are a unique commodity that make their own rules in many areas—including brand concentration. Perhaps nowhere else does the universally recognized brand loyalty of consumers demand that brands with almost paper-thin sales shares be stocked. Disappointing a customer who is loyal to a particular brand, and sending him to another store, could ultimately cost several thousand dollars a year in lost sales.

DAIRY

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
American, Pasteurized/ Processed Cheese	32.3	12.4	5.9	50.6	57.4	-11.8	3	8	—	—	—	◔
Butter	50.7	6.1	3.3	60.1	54.4	+10.5	1	—	—	—	—	◐
Grated Cheese	49.3	14.9	4.7	68.9	—	—	2	3	5	—	—	◕
Cheese Spread	48.7	10.4	8.6	67.7	—	—	2	3	5	—	—	◕
Cream Cheese	81.7		1.9	83.6	82.8	+1.0	1	1	1	1	0	●
Dips, Ready-to-Serve	16.4	16.1	11.0	43.5	45.7	-4.8	4	—	—	—	—	◔
Margarine	13.2	12.0	9.6	34.8	48.7	-28.5	6	9	11	12	-1	○
Orange Juice, Not Frozen	13.4	10.9	10.8	35.1	59.3	-40.8	5	9	—	8	—	○
Dough Products., Refrigerated (incl. frozen)	21.6	9.7	9.3	40.6	47.7	-14.9	5	9	12	8	+4	◔
Sour Cream	20.5	15.0	9.9	45.4	49.7	-8.7	4	—	—	—	—	◔
Yogurt	15.3	14.5	11.2	41.0	49.1	-16.5	5	9	12	13	-1	◔
Cheese, Natural or Imported	12.3	10.8	7.5	30.6	—	—	7	—	—	—	—	○
AVERAGE	31.3	11.2	7.7	50.2								

For six of the 12 dairy product categories listed here, there is no number of brands specified in the column indicating the number of brands specified to meet 75% of demand. The reason is simply that national brands must share department space with house brands to a degree that is not found in dry grocery sections. (That's why milk isn't even shown here.) But there are some categories in dairy for which we see that the #1 national brand has remained dominant enough to fight off both store brands and the challenges of rival national brands. The most enduring example is cream cheese, where the leader satisfies 81.7% of demand.

As a result of the many new entries in the refrigerated orange juice derby, the share claimed by the three leaders has plummeted from 59.3% to 35.1% over the past five years.

FROZEN FOODS

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Chicken, Breaded	25.1	12.4	9.2	46.7	70.9	-34.3	4	6	8	4	+4	◔
Desserts	10.6	8.8	6.6	26.0	42.2	-38.4	8	13	16	9	+7	○

Those responsible for solving the perennial space squeeze in their stores' frozen foods departments will find little solace from the trends revealed here.

THE FIVE QUINTILES:

● Far above average—Above 81%
◕ Above average—65.1 to 80.9%
◐ Average—51.6 to 65%
◔ Below average—38.1 to 51.5%
○ Far below average—Under 38.1%

Source: Mediamark Research Inc.

BRAND SHARE BY CATEGORY

FROZEN FOODS (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Dinners	23.2	12.1	11.7	47.0	62.1	-24.3	4	6	7	5	+2	
French Toast/Pancakes	36.4	27.2	17.6	81.2	77.9	+4.2	2	3	3	3	0	
Corn on the Cob	43.5	41.8	8.3	93.6	90.1	+3.9	2	2	2	2	0	
Main Courses/Entrées	16.1	13.8	13.3	43.2	57.9	-25.4	4	7	9	5	+4	
Pizza	14.7	7.0	6.9	28.6	40.3	-29.0	7	12	15	9	+6	
Potato Products	36.6	17.6	14.6	68.8	71.7	-4.0	2	3	5	4	+1	
Orange Juice	11.2	10.5	8.3	30.0	48.3	-37.9	8	14	17	12	+5	
Vegetables, Plain	19.6	17.8	5.1	42.5	41.7	+1.9	6	14	—	—	—	
Vegetables, Prepared	24.8	22.9	9.5	57.2	74.8	-23.5	3	5	7	4	+3	
Waffles	29.6	27.0	16.7	73.3	86.8	-15.5	2	3	4	3	+1	
Yogurt	32.8	18.3	14.4	65.5	60.0	+9.2	2	4	—	—	—	
Breakfast	50.5	26.4	10.2	87.1	—	—	1	2	2	—	—	
Ice Cream/Sherbert/Ice Milk	15.5	14.8	4.6	34.9	—	—	—	—	—	—	—	
Ice Cream Novelties	14.6	12.2	8.8	35.6	—	—	6	11	14	—	—	
Snacks (Fruit/Juice Bars)	31.5	10.6	7.5	49.6	—	—	4	7	9	—	—	
Bread Products	59.6	16.9	9.8	86.3	—	—	1	2	2	—	—	
h/Seafood	28.0	22.4	11.8	62.2	—	—	2	4	6	—	—	
Hot Snacks	31.0	14.9	12.3	58.2	—	—	3	4	5	—	—	
AVERAGE	27.7	17.8	10.4	55.9								

Almost across the board, the share of sales claimed by the three leading brands has shrunk over the last five years, and brand concentration further diffused.

Take the case of desserts (which include many varieties of cakes, pastries and pies), where just five years ago the three top brands garnered 42.2% of sales. Since then their share has shrunk by 38.4% to only 26.0%. So pity the poor frozens buyer/merchandiser who finds that the nine brands that could formerly be authorized to satisfy 75% of demand have swollen in number to 16 brands.

And even as brand concentration showed a severe erosion for refrigerated orange juice (see dairy above), there was a similar explosion of brands claiming consumer attention in the frozen orange juice section. Anyone who can't find a satisfactory orange juice somewhere in their supermarket just isn't trying.

Among the categories for which data from five years ago are not available, ice cream novelties show relatively low brand concentration, demanding 14 brands be on hand to satisfy 75% of demand.

GENERAL MERCHANDISE

AUTO SUPPLIES (BASE = ADULTS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Auto Wax/Polish	15.8	12.6	10.4	38.8	36.2	+7.2	5	8	10	14	-4	
Anti-Freeze/Coolant	65.2	10.0	8.6	83.8	78.0	+7.4	1	2	2	3	-1	
Gasoline Additives	62.2	11.6	5.3	79.1	67.4	+17.4	1	2	3	—	—	
Motor Oil	24.4	17.9	11.3	53.6	57.0	-6.0	3	5	6	8	-2	
Motor Oil Additives	48.2	35.4		83.6	57.9	+44.4	2	2	2	—	—	
AVERAGE	43.2	17.5	7.1	67.8								

Anti-freeze (65.2%), gasoline additives (62.2%) and motor oil additives (48.2%) all boast strong #1 brands which help propel this section toward the top of the departmental list of high brand concentration. Consumer loyalty to specific brands is spread thinnest in the case of auto wax/polish, with the #1 brand accounting for only 15.8% of sales, and 10 brands needed to meet 75% of demand.

THE FIVE QUINTILES:
- Far above average—Above 81%
- Above average—65.1 to 80.9%
- Average—51.6 to 65%
- Below average—38.1 to 51.5%
- Far below average—Under 38.1%

Source: Mediamark Research Inc.

BRAND SHARE BY CATEGORY

GENERAL MERCHANDISE (BASE = ADULTS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Batteries	39.0	32.8	10.8	82.6	93.7	-11.8	2	2	3	3	0	●
Film	66.6	9.4	7.4	83.4	88.2	-5.6	1	1	2	2	0	●
Pantyhose/Stockings*	25.0	13.0	10.0	48.0	59.4	-19.2	4	7	10	—	—	◔
Plant Food, Indoor	34.2	19.5	18.0	71.7	64.2	+11.7	2	3	4	4	0	◕
Video Tapes, Purchase	13.2	12.7	10.2	36.1	47.7	-24.3	5	7	8	6	+2	○
AVERAGE	35.6	17.5	11.3	64.4								

*BASE = MEN

As the home of one of the strongest brand franchises found anywhere in the supermarket, film maintains its high brand concentration (66.6% share for #1) despite increased rivalry over the past five years. In contrast, shares are spread very thinly for video tapes, with the three top brands each claiming a little over 10% of sales. Here the number of brands that needs to be stocked is no doubt influenced by the degree of perceived brand loyalty versus substitutability.

HEALTH & BEAUTY AIDS

BABY/CHILDREN'S HBA (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Baby Lotion	42.9	31.1	14.8	88.8	92.3	-3.8	2	2	3	2	+1	●
Baby Oil	68.0	10.3	6.9	85.2	—	—	1	1	2	2	0	●
Baby Ointments	49.4	20.3	15.6	85.3	90.4	-5.6	2	2	3	3	0	●
Baby Powder	52.2	27.3	5.1	84.6	84.6	0	1	2	2	3	-1	●
Baby Shampoo	79.2		4.5	83.7	86.8	-3.6	1	1	1	1	0	●
Baby Bath, Liquid	49.1		48.1	97.2	—	—	2	2	2	2	0	●
Teething Remedies	40.6	17.4		58.0	95.8	-39.5	2	—	—	2	—	◐
Children's Cold Tablets/Liquids	38.6	19.0	9.8	67.4	81.8	-17.6	2	3	4	3	+1	◕
Children's Cough Syrup	28.2	25.9	13.2	67.3	36.4	+84.9	2	3	4	—	—	◕
Children's Fever/Pain Relievers	28.9	26.7	13.1	68.7	58.8	+16.8	2	3	4	7	-3	◕
Soap, Baby's	42.9	24.6	16.6	84.1	85.1	-1.2	2	2	3	3	0	●
Vitamins, Children's	18.5	15.0	12.3	45.8	33.4	+37.1	4	5	6	11	-5	◔
AVERAGE	44.9	22.5	9.0	76.4								

No single section of the supermarket sustains such a high level of brand concentration across virtually all its member categories (with children's vitamins the exception). In the case of baby shampoo the #1 brand is so strong—with a 79.2% share—as to render other brands virtually redundant.

Similarly, liquid baby bath has two top brands of such combined strength (97.2%) that no other brand is reported. As a whole, therefore, this department is a space planner's dream with only one, two or three brands needed to satisfy 75% of demand for most categories.

In the case of the three remedies for children, including cold tablets and remedies, brand loyalty is likely to be a strong influence as mothers seek out the specific brand recommended by their pediatrician. So skimping on the stocking of marginal brands might be too costly in terms of customer satisfaction and repeat patronage.

COSMETICS (BASE = WOMEN)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Blusher	12.9	9.2	8.9	31.0	31.7	-2.8	6	9	11	12	-1	○
Complexion Care Products	13.0	11.5	10.9	35.4	33.8	+4.7	5	10	—	—	—	○
Face Powder, Loose	14.0	11.1	9.6	34.7	34.1	+1.8	5	8	9	11	-2	○
Facial Toners	20.8	18.8	18.1	57.7	—	—	3	4	—	—	—	◐

Brand concentration is notable by its virtual absence in the cosmetics section. Most #1 brands here can count themselves lucky to claim even 15% of sales, giving the top three brands an average of only 39.5% of sales, lowest of any but the two hair care categories.

THE FIVE QUINTILES:
● Far above average—Above 81%
◕ Above average—65.1 to 80.9%
◐ Average—51.6 to 65%
◔ Below average—38.1 to 51.5%
○ Far below average—Under 38.1%

Source: Mediamark Research Inc.

BRAND SHARE BY CATEGORY

COSMETICS (BASE = WOMEN)	THREE TOP BRANDS (% OF SALES) #1 #2 #3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Foundation Makeup	19.3 8.6 7.3	35.2	36.8	-4.3	6	10	13	12	+1	○
Eye Liner	12.8 10.9 9.2	32.9	48.3	-31.9	6	10	12	9	+3	○
Eye Shadow	17.0 10.2 8.8	36.0	43.5	-17.2	6	9	11	9	+2	○
Lipstick/Lip Gloss	14.5 8.1 7.0	29.6	40.0	-26.0	7	12	16	15	+1	○
Mascara	17.8 12.1 9.8	39.7	55.5	-28.5	5	8	10	7	+3	◔
Nail Polish	16.2 9.9 9.5	35.6	44.9	-21.7	5	8	9	8	+1	○
Nail Polish Remover	64.0 13.5 7.4	84.9	87.6	-3.1	1	2	2	2	0	●
Perfume/Cologne	11.2 7.0 3.0	21.2	30	-29.3	18	34	—	33	—	○
Pressed Powder	26.7 13.0 7.9	47.6	36.9	+29.0	4	7	8	12	-4	◔
Facial Cleansers	17.3 14.1 8.9	40.3	—	—	5	8	13		—	◔
Face Creams/Lotions	15.3 8.0 6.7	30.0	—	—	7	13	17	—	—	○
AVERAGE	19.5 11.1 8.9	39.5								

In two high-stakes categories where giants fight for brand share with slick multi-million dollar advertising assaults—lipstick and perfume—patronage is spread over dozens of glamorous brand names. Many of these names, of course, prefer to eschew supermarket exposure for the more glamorous surroundings of upscale department stores. But even without access to the leaders, supermarkets can find a ready outlet for their wares when customer purses face their own out-of-stock problems.

While brand concentration for cosmetics was among the weakest five years ago, the situation has worsened in almost every category. For eye liner, for example, top-three brand share fell in five years by 31.9% from 48.3% to 32.9%.

The exception to the pattern is nail polish remover, where the #1 brand claims 64.0%, and only two brands can satisfy 75% of demand.

FIRST AID/SKIN CARE (BASE = ADULTS)	THREE TOP BRANDS (% OF SALES) #1 #2 #3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Athlete's Food Remedies	29.5 20.6 17.0	67.1	63.3	+6.0	2	3	4	5	-1	◕
Adhesive Bandages	33.0 18.2 13.9	65.1	65.0	+0.1	2	4	5	5	0	◐
Cotton Swabs	63.7 20.9	84.6	—	—	1	2	2	2	0	●
Body Powder	32.5 17.9 12.3	62.7	69.5	-9.8	2	4	6	5	+1	◐
Lip Balm	23.3 22.2 14.8	60.3	—	—	3	5	7	—	—	◐
Sunburn Remedies	43.9 10.5 7.9	62.3	71.8	-13.2	2	4	—	4	—	◐
Sunscreen/Suntan Products	11.2 11.1 9.2	31.5	43.4	-27.4	7	11	15	11	+4	○
Corn/Wart Removers	49.4 28.8	78.2	—	—	2	2	2	2	0	◕
Groin Irritation Remedies	35.2 30.4	65.6	—	—	2	—	—	—	—	◕
AVERAGE	35.7 20.1 8.3	64.1								

Combination stores may have the space and resources to stock in-depth here, but traditional supermarkets of more modest size may have to stick with the leaders. In the case of such first aid staples as adhesive bandages and cotton swabs, the top three brands will satisfy most of demand.
But consumers appear *more fickle, or at least less* concentrated on any handful of brand leaders, in the case of sunscreens and suntan products. Here 11 brands were able to satisfy 75% of demand five years ago, but that number has swollen to 15 brands in tandem with a shrinking of brand concentration. Today the #1 brand claims a scant 11.2% of sales.

HAIR CARE, MEN'S (BASE = MEN)	THREE TOP BRANDS (% OF SALES) #1 #2 #3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Hair Conditioners	11.1 5.7 5.5	22.3	25.2	-11.5	10	16	21	22	-1	○
Hair Coloring	15.2 11.8 9.4	36.4	42.8	-15.0	5	8	12	13	-1	○
Hair Tonic/Dressing	18.5 13.3 12.0	43.8	42.5	+3.0	4	6	6	9	-3	◔

No category here—or in women's hair care, for that matter—can claim even a 20% share for its #1 brand. So supermarket HBA buyers often have to hope that shoppers in need of a product in one of these categories will simply follow the leader, because there's just not enough space for all the also-rans.

THE FIVE QUINTILES:
● Far above average—Above 81%
◕ Above average—65.1 to 80.9%
◐ Average—51.6 to 65%
◔ Below average—38.1 to 51.5%
○ Far below average—Under 38.1%

Source: Mediamark Research Inc.

BRAND SHARE BY CATEGORY

HAIR CARE, MEN'S (BASE = MEN)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Hair Sprays	11.4	8.5	6.2	26.1	21.0	+24.3	10	15	19	24	-5	○
Shampoo	14.6	8.7	5.3	28.6	26.9	+6.3	9	17	24	28	-4	○
Hair Conditioning Treatments	19.2	10.6	9.0	38.8	—	—	5	—	—	—	—	◔
Hair Mousse	12.1	8.8	8.6	29.5	—	—	6	9	12	—	—	○
AVERAGE	14.6	9.6	8.0	32.2								

Take hair sprays, for example. Trying to stock enough brands to satisfy just 50% of demand would mean carrying 10 brands, a number that swells to 15 and 19 for 67% and 75% of demand, respectively.

HAIR CARE, WOMEN'S (BASE = WOMEN)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Depilatories	16.7	16.6	10.6	43.9	50.0	-12.2	—	—	—	—	—	◔
Hair Coloring	15.6	12.7	11.8	40.1	42.9	-6.5	4	7	9	11	-2	◔
Hair Conditioners	8.3	7.1	6.8	22.2	25.7	-13.6	10	19	25	—	—	○
Hair Mousse	17.0	9.8	5.9	32.7	57.4	-43.0	7	14	—	5	—	○
Hair Styling Gels/Lotions	14.1	11.1	7.2	32.4	34.9	-7.2	7	—	—	—	—	○
Hair Sprays	13.2	7.5	6.4	27.1	32.9	-17.6	10	17	—	17	—	○
Home Permanents	19.5	10.2	9.7	39.4	34.6	+13.9	5	8	10	—	—	◔
Shampoo	7.8	5.7	5.0	18.5	18.8	-1.6	14	26	37	37	0	○
Hair Conditioning Treatments	14.4	11.2	8.5	34.1	—	—	6	—	—	—	—	○
AVERAGE	14.1	10.2	8.0	32.3								

The win, place and show positions of the top three brands in most of these categories make a tight race, with few #1 brands appreciably above their nearest rivals. And since all have modest shares, brand leadership is universally diffuse.

Shampoo used by women is the most extreme example, as well as representing one of the highest volume sectors. Added together, the top three brands of shampoo amass just 18.5% of sales.

Virtually every category has seen brand concentration sink over the past five years. A good example is hair mousse, relatively new five years ago with the three leaders claiming over half of sales (57.4%). But subsequent entries into this category cut top-three share almost in half to 32.7%.

MISC. WOMEN'S HBA (BASE = WOMEN)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Deodorants/Antiperspirants	7.3	6.9	6.7	20.9	23.6	-11.4	12	20	29	22	+7	○
Bath/Shower Additives	23.2	15.3	14.7	53.2	38.8	+37.1	3	5	8	—	—	◐
Body/Hand Cream/Lotion/Oil	17.1	8.3	7.4	32.8	34.5	-5.0	8	13	17	17	0	○
Body Sprays, Deodorants/ Colognes	42.2	25.0	7.3	74.5	—	—	2	2	4	—	—	◕
Feminine Hygiene Deodorant Sprays	49.2	46.1		95.3	77.8	+22.5	2	2	2	3	-1	●
Feminine Hygiene Douches/ Suppositories	58.3	29.5	6.1	93.9	82.5	+13.8	1	2	2	3	-1	●
Medicated Skin Ointment	26.3	12.8	12.1	51.2	49.3	+3.9	3	6	8	—	—	◔
Premenstrual or Period Pain Remedies	32.1	14.5	9.8	56.4	68.2	-17.3	3	5	6	5	+1	◐
Razor Blades	17.2	15.7	15.4	48.3	56.1	-13.9	4	6	8	9	-1	◔
Razors, Disposable	31.3	16.3	13.0	60.6	—	—	3	4	5	—	—	◐

In this potpourri of a category, brand concentration runs the gamut from light to heavy. Capturing the crown for lightest of the light are deodorants and antiperspirants used by women, with the #1 brand, at 7.3% of sales barely outpacing its two pursuers, for a three-brand share of a mere 20.9%. It is not surprising, then, that it would take an awesome display of some 29 brands to meet 75% of demand—not a number likely to be found in supermarkets.

Continued on page 104

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Source: Mediamark Research Inc.

BRAND POWER

1991 vs. 1986

THE RETAILER'S PERCEPTION

BY DAVID LITWAK AND JANET TORRES CEPEDA

We've all heard more than once that the number of products being introduced in the nation's supermarkets has increased greatly over the past five years.

Retailers have been arguing that many of these so-called "new" products are simply line extensions, or follow-the-leader products that have no real value to consumers. But is this true, or are more brands finding a legitimate market share?

As a follow-up to this year's Product Preference Study, which looked at how brand concentration has changed over the past five years, SUPERMARKET BUSINESS asked retailers how important they feel it is to carry a wide range of brands in specific categories.

A sample of 1,500 supermarket executives was asked about their perception of how brand loyalty for specific categories compared with general loyalty to all products throughout the store; whether the number of products that they authorized within specific categories changed over the past five years; whether shelf space allocated to specific categories had increased or decreased during that same period; and whether they felt that they had a sufficient number of products in a category to satisfy the needs of their consumers.

Respondents were merchandisers and store-level department managers of chains. Five hundred each were chosen from the dry grocery, perishables (dairy and frozen foods) and HBA/GM departments. All were asked to comment only on those product categories with which they were familiar.

Overall, respondents did not observe new products eroding brand loyalty in most categories. In about 49 percent of the categories, they felt that brand loyalty was no better or worse than it was for the majority of store products. In just a quarter of all the categories we examined did they feel that brand loyalty was greater or less than the store average.

Retailers say that in most categories, an increase in the number of brands stocked has had little effect on brand loyalty.

Despite a constant level of brand loyalty, retailers have increased the number of brands that they carry in the majority of categories. In 57 percent of the categories, the number of brands that they authorized to be stocked was up from five years ago. Only 6 percent of the retailers said that they reduced the number of brands.

This tracks well with the results of the Product Preference Study, which saw the percentage of sales of the top three brands decrease in 43 percent of the categories over the same period of time.

More brands, but fewer facings of each, seems to have been the watchword of supermarket merchandising over the past five years. Retailers said that while they did increase the number of brands carried, they did not increase the share of shelf space allotted to those categories.

In the final analysis, most of the retailers surveyed were content with the number of brands that they carried in these categories. Sixty-four percent said that they felt that they had just the right number of brands in each category to satisfy the needs of their customers. Only 15 percent felt that they needed more brands, and only 21 percent felt that they could still satisfy consumers with fewer brands.

If retailers are feeling cramped by the number of brands on their shelves in certain categories, it is as much a result of their own actions as those of manufacturers.

Many of those categories in which operators claim that they could have fewer products on their shelves and still satisfy customers, are the same categories in which the operators themselves authorized the most new products for their stores during the past five years. Examples of such categories are hair

Categories With The Most New Authorized Brands Added In Past Five Years

1. Frozen Foods
2. Pet Foods & Supplies
3. OTC Remedies
4. Refrigerated Meats
5. Snacks
6. Frozen Breakfast Foods
7. Breakfast Foods (packaged)
8. Deodorants & Antiperspirants
9. Dairy
10. Hair Care

BRAND POWER

BRAND LOYALTY

How Strong Is Customer Brand Loyalty For This Category Compared To All Products Sold In The Store?

CATEGORIES	Less loyalty in this category	About the same	More loyalty in this category
PERISHABLES CATEGORIES			
Refrigerated Meats	16 %	46 %	38 %
Dairy	18	36	46
Frozen Foods	12	63	25
- Entrees/Dinners	28	41	31
- Breakfast Foods	13	66	21
- Vegetables	34	41	24
- Juices	46	29	25
- Ice Cream	7	50	43
TOTAL PERISHABLES	**23 %**	**45 %**	**32 %**
DRY GROCERY CATEGORIES			
Baby Foods	6 %	37 %	57 %
Baked Goods (packaged)	33	54	3
Breakfast Foods	47	37	16
Candy	33	43	24
Desserts	43	43	14
Baking Ingredients	20	52	28
Canned Fruits, Juices & Vegetables	40	50	10
Oils & Dressings	17	69	14
Specialty Foods	24	38	38
Soft Drinks	37	40	23
Prepared Beverages	29	67	4
Beer & Wine	29	38	33
Snacks	45	48	7
Condiments & Sauces	23	70	7
Personal Soaps	17	66	17
Household Cleaners	32	55	13
Paper, Plastic & Foil Products	57	37	6
Household Supplies	32	68	0
Pet Foods & Supplies	23	68	30
Tobacco Products	30	33	37
Laundry Supplies	43	43	14
TOTAL DRY GROCERY CATEGORIES	**32 %**	**49 %**	**19 %**
HEALTH & BEAUTY AIDS CATEGORIES			
Baby HBA	12 %	44 %	44 %
First Aid	19	59	22
Skin Care	32	43	25
Cosmetics	8	54	38
Nail Care	23	58	19
Hair Care	31	42	27
Deodorants & Antiperspirants	14	50	36
Bath & Shower Products	41	56	3
Feminine Hygiene Products	16	48	36
Shaving Needs	21	61	18
Oral Hygiene Products	7	52	41
OTC Remedies	11	58	31
TOTAL HBA CATEGORIES	**19 %**	**53 %**	**28 %**
GENERAL MERCHANDISE CATEGORIES			
Auto Supplies	39 %	57 %	4 %
Batteries	0	56	44
Film	15	35	50
Video Tapes	39	43	18
Audio Tapes	40	40	20
Writing Implements, Stationery & School Supplies	42	50	8
Pantyhose & Apparel	8	50	42
TOTAL GENERAL MERCHANDISE	**26 %**	**47 %**	**27 %**
TOTAL ALL CATEGORIES	**26 %**	**49 %**	**25 %**

Among dry grocery categories retailers believe that there is generally less brand loyalty than for other product categories in the store. Snacks, paper products, laundry supplies and breakfast foods tend to be the weakest categories.

NUMBER OF BRANDS AUTHORIZED BY YOUR COMPANY

(Today versus 5 years ago)

CATEGORIES	Fewer today in this category	About the same	More today in this category
PERISHABLES CATEGORIES			
Refrigerated Meats	4 %	16 %	80 %
Dairy	4	21	75
Frozen Foods	0	11	89
- Entrées/Dinners	4	4	92
- Breakfast Foods	7	17	76
- Vegetables	3	31	66
- Juices	4	32	64
- Ice Cream	3	29	68
TOTAL PERISHABLES	**4 %**	**21 %**	**75 %**
DRY GROCERY CATEGORIES			
Baby Foods	0 %	50 %	50 %
Baked Goods (packaged)	3	30	67
Breakfast Foods	3	21	76
Candy	7	39	54
Desserts	11	43	46
Baking Ingredients	7	50	43
Canned Fruits, Juices &Vegetables	4	34	62
Oils & Dressings	3	28	69
Specialty Foods	7	32	61
Soft Drinks	7	57	36
Prepared Beverages	8	63	29
Beer & Wine	11	42	47
Snacks	0	20	80
Condiments & Sauces	0	67	33
Personal Soaps	3	61	36
Household Cleaners	4	55	41
Paper, Plastic & Foil Products	0	55	45
Household Supplies	4	63	33
Pet Foods & Supplies	0	14	86
Tobacco Products	0	50	50
Laundry Supplies	0	43	57
TOTAL DRY GROCERY CATEGORIES	**4 %**	**43 %**	**53 %**
HEALTH & BEAUTY AIDS CATEGORIES			
Baby HBA	4 %	27 %	69 %
First Aid	4	28	68
Skin Care	7	26	67
Cosmetics	12	46	42
Nail Care	15	35	50
Hair Care	12	15	73
Deodorants & Antiperspirants	0	25	75
Bath & Shower Products	8	44	48
Feminine Hygiene Products	4	36	60
Shaving Needs	7	57	36
Oral Hygiene Products	0	37	63
OTC Remedies	0	15	85
TOTAL HBA CATEGORIES	**5 %**	**35 %**	**60 %**
GENERAL MERCHANDISE CATEGORIES			
Auto Supplies	30 %	43 %	23 %
Batteries	8	36	56
Film	4	46	50
Video Tapes	4	26	70
Audio Tapes	5	50	45
Writing Implements, Stationery & School Supplies	4	48	48
Pantyhose & Apparel	12	52	36
TOTAL GENERAL MERCHANDISE	**10%**	**43 %**	**47 %**
TOTAL ALL CATEGORIES	**6%**	**37 %**	**57 %**

More products appears to be the direction of the grocery industry over the past five years. Retailers have authorized many more products in virtually all categories. Perishable categories, pet foods and supplies, and OTC remedies were the most increased sections.

BRAND POWER

CATEGORY'S SHARE OF STORE SPACE

(Today versus 5 years ago)

CATEGORIES	Less space today	About the same	More space today
PERISHABLES CATEGORIES			
Refrigerated Meats	4 %	67 %	29 %
Dairy	7	50	43
Frozen Foods	0	36	64
- Entrées/Dinners	4	34	62
- Breakfast Foods	0	50	50
- Vegetables	7	60	33
- Juices	4	64	32
- Ice Cream	0	32	68
TOTAL PERISHABLES	**3 %**	**48 %**	**49 %**
DRY GROCERY CATEGORIES			
Baby Foods	14 %	79 %	7 %
Baked Goods (packaged)	18	39	43
Breakfast Foods	3	40	57
Candy	7	55	38
Desserts	25	50	25
Baking Ingredients	17	72	11
Canned Fruits, Juices &Vegetables	4	50	46
Oils & Dressings	3	80	17
Specialty Foods	21	43	36
Soft Drinks	3	52	45
Prepared Beverages	20	60	20
Beer & Wine	5	75	20
Snacks	0	23	77
Condiments & Sauces	13	68	19
Personal Soaps	7	83	10
Household Cleaners	3	94	3
Paper, Plastic & Foil Products	10	67	23
Household Supplies	4	72	24
Pet Foods & Supplies	0	40	60
Tobacco Products	33	59	8
Laundry Supplies	7	70	23
TOTAL DRY GROCERY PRODUCTS	**11 %**	**60 %**	**29 %**
HEALTH & BEAUTY AIDS CATEGORIES			
Baby HBA	0 %	59 %	41 %
First Aid	0	73	27
Skin Care	11	56	33
Cosmetics	16	38	46
Nail Care	20	48	32
Hair Care	12	31	57
Deodorants & Antiperspirants	0	46	54
Bath & Shower Products	15	63	22
Feminine Hygiene Products	4	56	40
Shaving Needs	14	66	20
Oral Hygiene Products	0	52	48
OTC Remedies	0	23	77
TOTAL HBA CATEGORIES	**8 %**	**53 %**	**39 %**
GENERAL MERCHANDISE CATEGORIES			
Auto Supplies	43 %	39 %	18 %
Batteries	8	63	29
Film	4	56	40
Video Tapes	5	36	59
Audio Tapes	10	60	30
Writing Implements, Stationery & School Supplies	13	58	29
Pantyhose & Apparel	4	54	42
TOTAL GENERAL MERCHANDISE	**12 %**	**52 %**	**35 %**
TOTAL ALL CATEGORIES	**8 %**	**56 %**	**36 %**

The majority of retailers say that they now give most categories about the same percentage of the store's selling space as they did six years ago. Those categories that did receive the biggest increases were in the perishables and general merchandise departments.

DO YOU NEED FEWER BRANDS OR MORE BRANDS IN THE CATEGORY TO SATISFY YOUR CUSTOMERS?

CATEGORIES	Need fewer brands in this category	Current amount is fine	Need more in this category
PERISHABLES CATEGORIES			
Refrigerated Meats	12 %	71 %	17 %
Dairy	4	64	32
Frozen Foods	11	33	56
- Entrées/Dinners	18	46	36
- Breakfast Foods	18	48	34
- Vegetables	21	66	3
- Juices	17	72	11
- Ice Cream	11	50	39
TOTAL PERISHABLES	**15 %**	**58 %**	**27 %**
DRY GROCERY CATEGORIES			
Baby Foods	10 %	86 %	4 %
Baked Goods (packaged)	25	61	14
Breakfast Foods	37	50	13
Candy	11	72	17
Desserts	14	68	18
Baking Ingredients	21	69	10
Canned Fruits, Juices & Vegetables	30	53	17
Oils & Dressings	27	67	6
Specialty Foods	21	55	24
Soft Drinks	14	69	17
Prepared Beverages	20	68	12
Beer & Wine	20	80	0
Snacks	20	50	30
Condiments & Sauces	23	70	7
Personal Soaps	17	79	4
Household Cleaners	23	73	4
Paper, Plastic & Foil Products	23	67	10
Household Supplies	11	81	8
Pet Foods & Supplies	38	38	24
Tobacco Products	50	42	8
Laundry Supplies	21	76	3
TOTAL DRY GROCERY CATEGORIES	**23 %**	**65 %**	**12 %**
HEALTH & BEAUTY AIDS CATEGORIES			
Baby HBA	12 %	76 %	12 %
First Aid	19	65	16
Skin Care	22	70	8
Cosmetics	12	68	20
Nail Care	31	50	19
Hair Care	52	37	11
Deodorants & Antiperspirants	45	48	7
Bath & Shower Products	11	85	4
Feminine Hygiene Products	24	60	16
Shaving Needs	19	70	11
Oral Hygiene Products	30	52	18
OTC Remedies	23	42	35
TOTAL HBA CATEGORIES	**25 %**	**61 %**	**14 %**
GENERAL MERCHANDISE CATEGORIES			
Auto Supplies	21 %	63 %	16 %
Batteries	13	74	13
Film	4	88	8
Video Tapes	17	66	17
Audio Tapes	15	65	20
Writing Implements, Stationery & School Supplies	13	63	24
Pantyhose & Apparel	4	79	17
TOTAL GENERAL MERCHANDISE	**12 %**	**72 %**	**16 %**
TOTAL ALL CATEGORIES	**21 %**	**64 %**	**15 %**

Most operators feel that they currently stock enough different products to satisfy their customers. Dry grocery and HBA categories are among those which many feel that they could get by with fewer products.

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HEALTH & BEAUTY AIDS
SAMI FOUR-WEEK FOOD STORE UNIT TRENDS VS. YEAR AGO

PRODUCT GROUP AND CATEGORY	% CHANGE VS. YEAR AGO 4 WEEKS ENDING 11/2/90	4 WEEKS ENDING 11/30/90	4 WEEKS ENDING 12/28/90
BABY NEEDS	**- 6.9%**	**- 1.7%**	**- 7.3%**
Baby Powders	- 9.8	- 1.0	+ 2.3
Baby Oils, Creams & Lotions	- 9.1	- 5.3	- 16.6
Infant Clothes	- 15.7	- 6.5	- 11.4
Nursing Supplies	- 2.4	+ 2.1	+ 0.3
MISC. PERSONAL NEEDS	**+ 7.6%**	**+ 6.4%**	**+ 1.3%**
Contraceptives	+ 8.0	+ 1.6	- 2.7
Personal Lubricants	+ 4.3	+ 23.5	+ 5.4
Home Testing Kits	+ 21.2	+ 16.1	+ 18.5
Thermometers	- 2.8	+ 3.8	+ 0.2
DEODORANTS	**- 5.8%**	**- 3.9%**	**- 3.9**
Sprays	- 12.8	- 11.9	- 10.6
Roll-Ons	- 12.3	- 13.4	- 14.2
Stick Deodorants & Pads	- 0.5	+ 6.9	+ 3.7
Creams	- 11.6	- 14.6	- 12.2
Deodorants & Talcum Powders	- 16.4	- 28.4	- 19.2
Feminine Hygiene Deodorants	- 9.6	- 5.3	- 6.3
Foot Deodorants & Athlete's Foot Remedies	+ 4.2	+ 7.4	+ 11.0
Feminine Douches	- 2.4	- 9.2	- 3.7
FIRST AID	**- 2.2%**	**- 6.7%**	**- 6.0%**
Antiseptics	+ 3.3	+ 1.7	- 1.5
First Aid Products	- 4.4	- 9.5	- 7.8
Elastic Goods & Dressings	+ 40.4	+ 26.0	+ 40.0
HAIR CARE NEEDS	**- 5.0%**	**- 1.8%**	**- 3.2%**
Shampoos	- 6.2	- 2.7	- 2.5
Hair Sprays	- 5.8	- 0.5	- 5.4
Hair Conditioning Rinses	- 2.9	- 1.8	- 2.9
Hair Setting Needs	+ 1.8	+ 3.1	+ 2.8
Home Permanent Kits	- 14.6	- 13.8	- 10.6
Hair Coloring	- 4.4	- 2.8	- 1.8
Hair Dressing Needs	- 6.6	- 7.3	- 9.4
ORAL HYGIENE	**- 2.8%**	**- 5.5%**	**- 4.4%**
Toothpastes & Powders	- 3.0	- 4.9	- 3.2
Mouthwashes	- 4.7	- 10.5	- 12.5
Breath Fresheners	- 0.8	- 4.5	- 0.4
Denture Cleaners	+ 2.6	- 2.2	- 4.8
Denture Adhesives	- 6.7	- 3.5	- 10.4
Toothbrushes	- 2.2	- 5.9	+ 1.2
Dental Aids	+ 6.1	+ 9.6	+ 3.1
PROPRIETARY REMEDIES	**- 3.9%**	**- 2.2%**	**- 9.2%**
Antacids	- 2.5	- 1.9	- 2.0
Internal Analgesics	- 5.2	- 7.9	- 9.2
External Analgesics	+ 10.1	+ 3.8	+ 3.1
Cold Remedies	- 2.5	+ 4.9	- 12.9
Nasal Sprays/Drops/Inhalers	- 4.0	+ 1.3	- 12.1
Chest Rubs	+ 0.1	- 3.8	- 14.6
Cough Remedies	- 4.8	+ 1.7	- 16.1
Laxatives	- 3.7	- 3.5	- 5.8
Sleeping Aids	+ 6.1	+ 6.0	+ 4.8
Tranquilizers	- 15.4	- 19.3	- 13.0
Eye Care Products	- 5.6	- 3.2	- 3.0
Appetite Suppressants	- 13.7	- 21.4	- 24.2
Synthetic Vitamins	- 12.3	- 12.3	- 11.9
Natural Vitamins	+ 1.1	- 1.1	+ 4.6
Misc. Proprietary Remedies	+ 1.2	- 1.0	- 1.9
SHAVING NEEDS	**- 2.8%**	**- 3.7%**	**- 4.6%**
Shaving Creams	- 0.8	- 1.3	- 4.0
Pre-Shave Lotions	- 7.1	- 10.5	- 3.4
After-Shave Lotions	- 10.8	- 6.9	- 13.8
Razor Blades	- 2.6	- 4.2	- 3.6
SKIN CARE AIDS	**- 0.8%**	**- 4.6**	**- 15.2%**
Hand & Body Creams & Lotions	- 9.2	- 13.2	- 24.7
Facial Preparations	+ 3.8	+ 9.9	+ 1.7
Lip Care Products	+ 7.6	- 3.1	- 16.9
Suntan Lotions & Oils	+ 84.2	+ 41.1	+ 1.6
Cosmetic & Medicated Skin Aids	- 1.4	+ 0.5	+ 2.2
TOTAL ALL CATEGORIES	**- 3.8%**	**+ 3.3%**	**- 6.7%**

POOR YEAR FOR HBA ENDS WITH DISMAL DECEMBER SALES

Recession, weather and dearth of innovative new products are cited as reasons for the decline from 1989 unit sales levels.

BY ALAN B. MILLER JR.

Anyone expecting a year-end upturn in food store sales of health and beauty aids was disappointed as the volume tabulations for the 28-day SAMI tracking period ending December 28, 1990, were completed. Unit volume in all 57 HBA categories combined fell 6.7% below the level in the corresponding year-ago period, and sales for the full 52-week period were also in the minus column.

Of small comfort perhaps, annual unit sales in the other four product departments were also below the 1989 levels, albeit to a lesser extent. Unit sales of dry grocery non-food items were down 1.8%, whereas the decline for refrigerated foods was a minuscule 0.2%. Unit sales in the December reporting period were also below last year's level in all five product departments.

Dollar decline lower

As a result of inflation and some upgrading of purchases in the product mix, the HBA dollar loss for the four-week span was only 3.5%. The only other product department with a four-week dollar loss was the 1.7% decline for dry grocery non-food. Each of the three food departments enjoyed four-week dollar increases: dry grocery: food (+1.4%), frozen (+2.2%) and refrigerated (+5.3%). For the full year all five product departments exhibited dollar volume advances ranging from 1.0% for dry grocery: non-food and 1.7% for HBA to highs of +8.8% in the case of refrigerated foods and +4.4% for frozens.

The year-end weakness of health and beauty aids items was not limited to food outlets. In drugstores nationally, the 57 category total fell 7.5% in units and 3.2% in dollars. Although proprietary medicines and beauty enhancement products are often regarded as recession-proof, each period of economic weakness displays exceptions to the generally recognized rules. During the 1981 recession, for example, private labels flourished, although traditionally, price brands fare poorly when times are tough. The year-end weather patterns in much of the country, especially versus the unusual frigid conditions in December 1989, may have affected HBA buying patterns in 1990. Sales of cold remedies fell sharply without exception, and weather may also help to explain December losses as high as 24.7% for hand and body cream and lotions and 16.9% for lip care products.

A third factor that may have contributed to poor sales showings for HBA categories throughout the year is the absence of high-volume innovative new products, which often serve to expand overall volume. However, even such new product successes as Gillette's Sensor Razors, Helene Curtis's Degree, or Warner-Lambert's Medi Flu were unsuccessful in providing upward trends for the categories in which they were competing. During the December reporting period, only one product group managed to show a unit gain—personal needs, where sales advanced a scant 1.3% as a result of the continuing rapid growth of home testing kits.

Percentagewise, the highest product group decline was a 15.2% loss among skin care aids resulting from the skids for hand and body creams/lotions and skin care aids. But the most devastating dollar decline for product groups was the 9.2% loss for high-volume proprietary remedies. Four-week unit sales were 8.7 million below the 1989 December level.

In spite of the fact that baby

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BRAND SHARE BY CATEGORY

Continued from page 59

MISC. WOMEN'S HBA

(BASE = WOMEN)

	THREE TOP BRANDS (% OF SALES) #1 #2 #3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Sanitary Napkins	11.1 10.6 10.6	32.3	40.0	-19.2	6	9	11	10	+1	
Shaving Cream/Gel	20.8 14.1 12.0	46.9	48.0	-2.3	4	6	7	8	-1	
Soap, Personal Care, Bar	15.2 14.7 10.6	40.5	—	—	5	9	11	—	—	
Soap, Personal Care, Liquid	27.6 27.0 18.1	72.7	—	—	2	3	4	—	—	
Tampons	36.6 18.4 11.6	66.6	94.9	-29.8	2	4	4	2	+2	
AVERAGE	27.7 13.7 10.4	51.8								

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At the other end of the spectrum, the two feminine hygiene products together register a combined six-brand share that exceeds 90%, making it easy to identify and stock the leaders—just two will do the trick—to the exclusion of all others. Both sanitary napkins and tampons have experienced an erosion in brand concentration over the last five years, making it necessary to add two more brands to each category to meet 75% of sales demand.

ORAL HBA

(BASE = ADULTS)

	THREE TOP BRANDS (% OF SALES) #1 #2 #3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Canker Sore/Gum/Toothache Remedies	31.9 25.4 19.7	77.0	82.2	-6.3	2	3	3	3	0	
Dental Floss	66.3 10.1 3.3	79.7	84.6	-5.8	1	2	2	1	+1	
Dental Rinse	52.6 26.1 8.4	87.1	—	—	1	2	2	2	0	
Denture Cleaners	44.0 26.1 15.9	86.0	82.9	+3.7	2	2	3	3	0	
Denture Adhesives/Fixatives	36.3 19.0 15.6	70.9	49.0	+44.7	2	3	4	7	-3	
Mouthwash	27.5 21.1 9.3	57.9	65.2	-11.2	3	5	6	5	+1	
Toothbrushes	28.0 15.3 9.5	52.8	54.9	-3.8	3	5	8	—	—	
Toothpaste	17.8 14.4 12.6	44.8	45.2	-0.9	4	6	7	8	-1	
Tooth Polish	28.1 17.3 14.8	60.2	—	—	3	—	—	—	—	
AVERAGE	36.9 19.4 12.1	68.4								

With the exception of HBA for babies and children, oral HBA shows the highest brand concentration in the HBA department. Underpinning this is the presence of such high-concentration categories as dental floss (with the top three brands covering 79.7% of demand), dental rinse (87.1%) and denture cleaners (86.0%). Of these, dental floss has the most dominant #1 brand (66.3%).

Not unexpectedly, the highly competitive toothpaste category displays the lowest brand concentration, with the #1 brand pulling only 17.8% of sales. Buyers whose goal it is to stock enough brands to satisfy 75% of demand would need to authorize seven brands.

REMEDIES/MISC. HBA

(BASE = ADULTS)

	THREE TOP BRANDS (% OF SALES) #1 #2 #3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Asthma Relief Remedies	52.7 19.8	72.5	78.7	-7.9	1	2	—	3	—	
Cold/Sinus/Allergy Remedies	8.3 6.6 6.4	21.3	27.1	-21.4	10	17	23	18	+5	
Cough Syrup	21.2 12.7 10.3	44.2	61.6	-28.2	4	7	10	5	+5	
Diet Pills	61.4 11.6 9.8	82.8	81.4	+1.7	1	2	3	2	+1	
Diarrhea Remedies	46.5 26.9 10.9	84.3	90.6	-7.0	2	2	3	2	+1	
Eye Drops/Eye Wash	31.4 13.1 10.1	54.6	59.7	-8.5	3	5	7	7	0	
Headache Remedies/Pain Relievers	14.4 12.2 11.0	37.6	38.3	-1.7	6	11	15	15	0	
Indigestion/Upset Stomach Remedies	19.4 18.1 9.1	46.6	38.8	+20.1	4	6	8	8	0	
Hemorrhoid Remedies	54.2 14.7 14.4	83.3	81.4	+2.3	1	2	3	3	0	

Who cares if there's no cure for the common cold? There are regiments of over-counter products that are poised to do battle with the symptoms. Small wonder that the share of sales claimed by the top three brands, an anemic 27.1% five years ago, has been attenuated to an even thinner 21.3% since then, with the #1 brand scoring only 8.3% of sales. As a result, the number of brands required to make a 75%-of-sales goal has ballooned over the same period from 18 to 23.

For only one of the many remedies categories included here has brand concentration increased, as users of indigestion/upset stomach remedies have been increasingly finding relief from one of the top three brands. While these brands

THE FIVE QUINTILES:

- Far above average—Above 81%
- Above average—65.1 to 80.9%
- Average—51.6 to 65%
- Below average—38.1 to 51.5%
- Far below average—Under 38.1%

Source: Mediamark Research Inc.

BRAND SHARE BY CATEGORY

REMEDIES/MISC. HBA (BASE = ADULTS)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Laxatives	30.8	14.7	10.6	56.1	56.0	+0.2	3	5	7	8	-1	
Nasal Sprays	30.5	13.3	12.5	56.3	60.6	-7.1	3	4	5	5	0	
Sleeping Tablets	29.3	22.9	15.9	68.1	68.6	-0.7	2	3	—	4	—	
Throat Remedies, Medicated	29.1	21.3	12.4	62.8	67.7	-7.2	2	4	5	4	+1	
Pain Relieving Rubs/Liquids	32.6	11.4	11.1	55.1	66.7	-17.4	3	5	6	4	+2	
Vitamin Tablets/Capsules/Liquids	13.2	3.5	3.1	19.8	18.7	+5.9	—	—	—	—	—	
Contact Lens Cleaning Solutions	38.9	14.4	11.6	64.9	—	—	2	4	5	—	—	
Pregnancy Test, In-Home	40.0	25.2	10.2	75.4	—	—	2	3	3	—	—	
AVERAGE	32.6	15.4	10.0	58.0								

SKIN CARE/SHAVING, MEN'S (BASE = MEN)	THREE TOP BRANDS (% OF SALES) #1	#2	#3	Total Today	Total 5 Yrs Ago	Today vs. 5 Yrs Ago	NO. OF BRANDS NEEDED TO REACH: 50% Today	67% Today	75% Today	75% 5 Yrs Ago	Today vs. 5 Yrs Ago	BRAND CONCENTRATION QUINTILE
Antiperspirant/Deodorant	16.1	10.1	6.0	32.2	35.4	-9.0	9	18	23	17	+6	
Aftershave Lotion/Cologne	15.8	9.7	8.5	34.0	34.6	-1.7	6	11	13	11	+2	
Complexion Care Products	16.4	8.4	7.9	32.7	34.6	-5.5	6	9	11	21	-10	
Disposable Razors	35.0	22.8	11.8	69.6	84.4	-17.5	2	3	4	3	+1	
Facial Cleansers	24.5	11.2	6.7	42.4	—	—	5	9	12	—	—	
Facial Toners	23.2	18.6	17.6	59.4	—	—	3	4	—	—	—	
Body/Hand Cream/Lotion/Oil	22.6	7.6	6.8	37.0	34.6	+6.9	7	12	15	17	-2	
Medicated Skin Ointment	23.5	13.4	10.0	46.9	54.8	-14.6	4	7	9	—	—	
Razor Blades	22.7	20.5	17.2	60.4	60.5	-0.2	3	5	7	8	-1	
Shaving Creams/Gels	25.4	16.6	13.3	55.3	44.1	+25.4	3	5	7	8	-1	
Soap, Personal Care, Bar	15.5	15.2	9.9	40.6	—	—	4	7	9	—	—	
Soap, Personal Care, Liquid	36.2	24.5	12.2	72.9	—	—	2	3	4	—	—	
Pre-Electric Shave Lotion	37.6	35.6	19.1	92.3	90.8	+1.7	2	2	3	3	0	
AVERAGE	24.2	16.5	11.3	52.0								

AVERAGE, ALL CATEGORIES	32.1	16.7	9.6	58.4								

While these brands claimed only 38.8% of sales five years ago, that proportion has risen to 46.6%, making housekeeping in this section somewhat easier.

For many of these product categories, two, three or four brands is all that's needed to satisfy 75% of demand. The greatest exception in addition to the cold remedies mentioned above is headache remedies and pain relievers, where it takes 15 brands to do the job, the same as five years ago.

Vitamins are a problematic category, with consumer allegiances spread over so many brands with such minute brand shares that even the #2 and #3 brands can scarcely achieve 3% shares.

The lowest incidence of brand concentration here is registered by men's deodorants and antiperspirants, where the top three brands account for only 32.2% of sales. This means that even to meet 50% of sales, a store must stock nine brands, with the number skyrocketing to 23 to meet 75% of sales.

When it comes time to shave, however, men are somewhat more loyal to the front-runners, with the top three brands bringing in 60.4% of razor blade sales and 55.3% for shaving cream. In the case of the latter, brand concentration has shown a substantial growth over the past five years (from 44.1% to 55.3%), the only category in this section where such a trend can be noted.

THE FIVE QUINTILES:
- Far above average—Above 61%
- Above average—65.1 to 60.9%
- Average—61.6 to 65%
- Below average—38.1 to 51.5%
- Far below average—Under 38.1%

Source: Mediamark Research Inc.

SAMI UPDATE

Continued from page 103

needs volume declined 7.3%, there were gain rates in two of the four product categories. The 2.3% gain for baby powders can be attributed to the national roll-out of Mennen, the sales strength of Caldesene, and a slight improvement for private labels. Two brands that supplied plus volume in the nursing supply category were Gerber's Nuk and Playtex's Cherubs, which completed national distribution.

In the personal needs product group, four-week sales of contraceptives declined 2.7%, although the leading brands, Trojans and Trojan-Enz, have been exhibiting consistently strong performance. Part of the gain for personal lubricants can be credited to the completion of national availability of Replens. All major brands of home testing kits except First Response had double-digit gain rates.

Only two out of eight categories of personal deodorants had four-week unit volume gains. New product launchings and rollouts were responsible for a 3.7% gain among stick deodorants and pads. The brand new sticks included Lady Speed Teen Spirit Stick and Jovan Actives. Both Degree and No Sweat completed national distribution. The other major gain was provided by Faberge Power Stick. The other category gain was an 11.0% increase for foot deodorants and athlete's foot remedies, where the national launch of Schering's Lotrimin has expanded category volume.

The only gain in the first aid product group was a 40.0% jump for elastic goods and dressings, artificially created by the addition of items not tracked in the comparable year-ago period. There were three other major new products introduced: Caladryl Antiseptic, and Sesame Street and Ninja Turtle bandages.

Sales of hair care needs fell 3.2% and the only product category with a plus trend was hair setting needs (+2.8%), where Rave was new and L'Oreal Studio, Suave, Salon Selectives, L.A. Looks and Aussie had increased sales.

Among shampoos, two of the three top brands, Pert Plus and Suave, demonstrated double-digit gain rates and new entries included Vidal Sassoon Ultra Care, Fisher Price, Revlon Flex & Go, and L'Oreal Colorvive. There were no major new hair spray introductions and the only new product of note among hair conditioning rinses was L'Oreal Colorvive. Toni Epic Wave has all but disappeared in home permanent kits.

Two oral hygiene categories showed four-week plusses: toothbrushes (+1.2%) and dental aids (+3.1%). The focus brand among tooth paste and powders was Arm & Hammer Dental Care, which now enjoys food store volume nearing the $40 million level.

The brightest spot in the mouthwash category has been the national launch of Act for Kids. Private labels have been enjoying strong growth. Warner-Lambert has introduced Fresh N Brite Denture Cleaner but the volume for this new brand was not sufficient to bring about a category gain.

Proprietary remedies

Out of 15 categories of proprietary remedies, there were only three with four-week growth. A gain of 3.1% for external analgesics can be traced to the strong performance of five major brands: Aspercreme, Mineral Ice, Eucalyptamint, Flex-All 454 and Sportscreme. The 4.8% improvement among sleeping aids was aided by the national debut of Sominex Dosage I and an advance for Nytol.

The Nature-Made line of natural vitamins, minerals and supplements helped create a category gain. Strong proprietary remedy brands in categories with loss rates included: Imodium anti-diarrhea, Tylenol and Theraflu cold remedies, Nasal nasal spray, CibaVision and Centrum vitamins. Dimetapp cough remedy was new and national.

There were four-week unit volume losses in each of the four categories of shaving needs, placed by a 13.8% decline for after shave lotions in the important year-end holiday season. Shaving cream sales shrank 4.0% in spite of high gain rates for Soft Sense and Brut 33. In the razor blades category, Gillette Sensor has become the number one brand in the category. There was also strong performance by Daisy Ladies Plus, Schick Slim Twin Disposable and Lady Bic.

As noted previously, the highest loss rate for a product group was the 15.2% erosion among skin care aids. But there were four-week unit sales gains in three of the five categories: facial preparations (+1.7%), suntan lotion-suntan oil (+1.6%), and cosmetic and medicated skin aids (+2.2%).

In the beleaguered hand and body cream/lotion category, the only major brand sales gains were achieved by Suave, St. Ives, Eucerin, Nivea Skin Oil and Nature's Family. Most of the honors in the facial preparations category belong to Oil of Olay Lotion, St. Ives, L'Oreal Plenitude and a national launch of Olay. Changes among brands of suntan lotion-suntan oil lack significance in the aseasonal December period. ■

BRAND LOYALTY

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care, deodorant, pet food, and breakfast food products.

All in all, retailers expressed satisfaction with the scope of the products they carried.

There was no great outcry about too many brands flooding the market and taking over the shelves. As a general rule, retailers and consumers have learned to live with what they both feel is necessary to have on their supermarket shelves. ■

Brand Loyalty

Categories With Strongest Loyalty	Categories With Weakest Loyalty
1. Baby Foods	1. Breakfast Foods
2. Film	2. Refrigerated Juices
3. Dairy	3. Snacks
4. Baby HBA	4. Desserts
5. Batteries	5. Laundry Supplies
6. Ice Cream	6. Writing Implements, Stationery
7. Panty Hose & Apparel	7. Bath & Shower Products
8. Oral Hygiene Products	8. Canned Juices, Drinks, Vegetables
9. Refrigerated Meats	9. Audio Tapes
10. Cosmetics	10. VideoTapes

Do You Need More Brands Or Fewer Brands In A Category To Satisfy Consumers?

Categories Needing More Brands	Categories Needing Fewer Brands
1. Dairy	1. Hair Care
2. Frozen Juices	2. Tobacco Products
3. Frozen Foods	3. Deodorants & Antiperspirants
4. OTC Remedies	4. Pet Foods & Supplies
5. Frozen Entrées/Dinners	5. Breakfast Foods (packaged)
6. Refrigerated Meats	6. Nail Care
7. Snacks	7. Canned Juices, Drinks, Vegetables
8. Specialty Foods	8. Oral Hygiene Products
9. Writing Implements, Stationery	9. Oils & Dressings

PRODUCE

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Distributors Association (Nogales).

These fruit and vegetable associations of Mexico contribute to a promotional fund that is administered by a company in, of all places, Santa Claus Lake, Maine. An aggressive field merchandising and market support program is competently carried out by this organization that has many years of experience with Mexican produce.

Early spring boost

The months of March, April and May represent nearly 40 percent of the total exports from Mexico to the U.S., and some of the most profitable and fastest growing categories in the produce department get a huge boost during this early spring period. The major items are the following:

•**Melons:** Well over 600 million pounds will come north in the three-month period of March, April and May: 300 million pounds of watermelons, 225 million pounds of cantaloupes and over 70 million pounds of honeydews. In April alone nearly 235 million pounds of melons will cross the border.

•**Tomatoes:** Although shipments peak in February, 223 million pounds reach the U.S. from Mexico in the March, April, May period—about 30 percent of the year's total. (Twenty-five million pounds of cherry tomatoes add to that total.)

•**Bell peppers:** It's the biggest time of year for peppers, with 65 million pounds being shipped north in March and April.

•**Mangoes:** The start of the mango imports from Mexico (which ships a total of 124 million pounds to the U.S.) takes place in these early spring months, with 27 million pounds shipped.

•**Other major items:** Dry onions, 150 million pounds; cucumbers, 100 million pounds; squash, 85 million pounds; celery, 11.5 million pounds.

Altogether, the months of March, April and May represent 1.7 billion pounds of fresh fruits and vegetables from Mexico—about 7 pounds per capita for all of us in the U.S. At an estimated retail of over a billion dollars, that's big business for supermarkets. ■

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